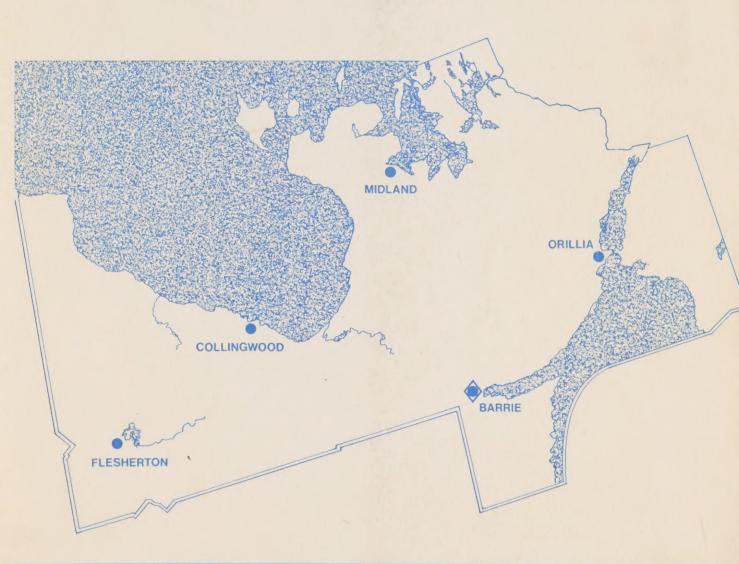
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Tourism Development Strategy Volume II Technical Appendix



Marshall Macklin Monaghan Thorne, Stevenson & Kellogg



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TOURISM DEVELOPMENT STRATEGY

COLLINGWOOD-MIDLAND-ORILLIA ZONE

VOLUME 2

TECHNICAL APPENDIX



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Ontario Ministry of Industry & Tourism

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1.0 INTRODUCTION

In September 1979, Marshall Macklin Monaghan Limited was retained by the Ontario Ministry of Industry and Tourism to undertake the preparation of a Tourism Development Plan for the Collingwood-Midland-Orillia Tourism Development Zone (Drawing #1).

The following text is presented as a technical appendix to the Tourism Development Plan and provides the resource, policy and market context within which the plan strategies have been formulated. All information contained in this background document has been derived from secondary sources. The contents of this volume are as follows:

Natural Resources:

This section describes the climatic, biophysical resources and characteristics of the study area as they relate to the tourism industry.

Tourism Facilities and Services Infrastructure:

This section indicates the development extent of a tourism infrastructure composed of recreational lands and facilities, tourist accommodation, dining facilities, service centres, resorts, transportation systems and events and attractions.

Historical and Archaeological Resources:

A broad overview is given of the history of the study area, describes the remaining artifacts which reflect this history, and suggests interpretive themes around which these artifacts may be developed.

Tourism Use Patterns, Market and Trends:

This section provides a detailed inventory of the characteristics of existing, anticipated and potential markets for the Collingwood-Midland-Orillia area tourism industry.

Demographic Characteristics:

Information is presented on the demographic characteristics of populations residing in the study area. This information provides an understanding of the local human resources available to the tourism industry, the possible requirements of local populations, and the nature of local communities.

Jurisdictions and Development Controls:

This section provides the jurisdictional and policy context within which the tourism strategies have been developed. In addition, it describes the Ontario land development process which will affect the implementation of proposed tourism strategies. Study Zone



2.0 NATURAL RESOURCES

2.1 Physiographic and Landscape Units

It is essential that a study area the size of the Collingwood-Midland-Orillia area be divided into more meaningful and manageable subcomponents in order to facilitate both data assembly and analysis. This division has been achieved by identifying and mapping the various physiographic regions of which the study area is composed. In total, 11 physiographic units (regions) were identified each distinctly different from the other and intrinsically homogeneous with respect to such macro aspects as relief, geology or glacial formation. However, within each physiographic unit, there are usually a number of local anomalies related to such micro aspects as surficial soils, forest type, and aquatic environs. Identification of these more specific characteristics within spacially cohesive areas, termed "landscape units", assists in further refining the physiographic unit by producing smaller, more homogeneous units.

In total, 41 landscape units were identified. Each landscape unit is subsequently described within the context of the larger physiographic unit of which it is a part. Drawing No.2 delineates the physiographic and landscape units, and Figure 1 identifies the biophysical characteristics of each landscape unit. This matrix will provide the foundation upon which subsequent recreational capability analyses of individual landscape units will be based. Each physiographic unit and its component landscape units are subsequently discussed.

2.1.1 Precambrian Shield

Occupying the extreme northeast portion of the study area, this unit is characterized by a lack of overburden, and hard granites and gneisses which often appear at the surface. The Severn River

flows through this unit along with many smaller rivers and associated lakes. The Georgian Bay shoreline within this unit is characterized by hundreds of small islands which form part of the 30,000 Islands chain. The Precambrian Shield has been divided into the following landscape units:

a) Georgian Bay Islands

The Georgian Bay Islands form part of the 30,000 Islands archipelago. Agricultural land use is very limited due to the lack of adequate soil cover. Tourism potential of this landscape unit is augmented by the aesthetically appealing rocky and windswept terrain and by its suitability for water-based recreation activities.

b) Severn Waterway

This landscape unit contains a section of the Trent-Severn Waterway extending from Port Severn to Severn Falls. A small area with clay soils near Port Severn accounts for most of the agricultural land use within this unit. Numerous small lakes and rivers make this a popular area for boating and water-based recreation.

c) Matchedash Lakeland

Bounded on the north by the Trent-Severn Waterway, this area is characterized by numerous small lakes, wetlands and rivers. It supports little agricultural activity, however, extensive forest cover and hummocky terrain make this area suitable for various forms of extensive recreation.

d) Lake Couchiching Shoreline

Extending around the northern portion of Lake Couchiching, this landscape unit has little topographic relief and supports little agricultural activity. Tourism and recreational use is limited to water-based recreation along the shoreline and on the Trent-Severn Waterway.

e) Black River Plain

This landscape unit is characterized by low relief, poor drainage and a lack of overburden. Extensive recreation activities, including canoeing, are potential uses within this area.

2.1.2 Simcoe Uplands

A considerable portion of these uplands are separated from the surrounding lowlands by the ancient shore bluffs of former glacial Lakes Algonquin and Nipissing. This area consists of a series of ridges separated by steep-sided, flat-floored valleys. The presence of numerous shorelines and beaches indicate that these ridges were probably islands in glacial Lake Algonquin. The deep tills comprising these ridges are generally gritty loam with numerous boulders.

A large area of sandy kame moraines is found within Oro and Medonte Townships, and several drumlins are found near Orillia. The uplands on the Tiny-Tay peninsula were probably submerged in glacial Lake Algonquin as is evidenced by boulder pavement and sand and silt deposits.

The soils covering the uplands are, for the most part, sandy loam and loamy sand tills and outwash. The landscape units within the Simcoe Uplands are as follows:

a) Christian Island Group

This landscape unit includes four islands: Christian, Beckwith, Hope and Giants Tomb. Giants Tomb Island is primarily composed of sedimentary rock with little overburden. The

other three islands have significant amounts of loamy sand soil cover. Numerous modern beach deposits provide the recreational focus for the islands.

b) Peninsula Headland

Characterized by ancient shore bluffs and modern beach deposits, this landscape unit has a predominantly loamy sand soil cover. Present recreational use consists mainly of water-based recreational cottaging.

c) Tay Harbours

This landscape unit is characterized by several large bays and peninsulas extending into Georgian Bay. The soil cover is predominantly loamy sand and supports little agricultural activity. This area is extensively used for cottaging.

d) Simcoe Upland

This upland area consists primarily of sandy loam soils with till plain conditions. Several drumlins are found near Orillia and, along with several other scattered areas, provide the unit's major topographic relief. A considerable portion of this area has been cleared for agriculture. Steep and rolling topography and extensive forest cover in certain areas provide excellent recreational settings.

e) Medonte Uplands

The upland "islands" of this unit - remnants of ancient Lake Algonquin - are overlain by sand and gravel till deposits. The soils are predominantly sandy loams which provide good agricultural opportunities where steep slopes do not constitute a constraint to cultivation. The steep slopes and varied terrain are ideal for alpine skiing, cross-country skiing and hiking.

f) Oro Sandhills Moraine

This area of kame moraine is characterized by rolling topography with numerous steep slopes. The soils are primarily loam sands supporting a moderate amount of agricultural land use. The steep, hummocky terrain is conducive to several forms of recreation such as alpine skiing and hiking.

2.1.3 Simcoe Lowlands

This unit extends around Lakes Simcoe and Couchiching. At one time this basin was flooded by former Lake Algonquin as evidenced by numerous ancient shore ridges and beaches, and extensive areas of underlying clay and sand. The area is predominantly overlain with loamy tills and sandy outwash deposits.

The Simcoe Lowlands contain several interesting landscape features. The northern and western shores of Lake Simcoe consist of a narrow, bouldery terrace usually confined by a low bluff cut by postglacial Lake Algonquin. In Mara Township, a moderately large clay plain is overlain with loam till and dotted with numerous drumlins. The landscape units found within this physiographic unit are as follows:

a) West Lake Simcoe Shoreline

Modern beach deposits are the landforms most associated with this landscape unit. Located within a sand plain, this unit's sandy loam soils support a moderate amount of agricultural activity. Present recreational activity is centered around the numerous beaches and shoreline areas.

b) Lake Couchiching Shoreline

The west side of Lake Couchiching is part of a sand plain, while the east side is part of a clay plain which extends into the Mara Drumlin Field. The sandy loam soils support

a moderate amount of agricultural activity. Water-based recreation is the main focus for tourism within this land-scape unit.

c) East Lake Simcoe Shoreline

This landscape unit is part of a large clay plain with overlying sandy loam soils and numerous modern beach deposits. In addition to the beaches, several large bays support considerable cottaging and water-based recreation activity.

d) Couchiching Plain

The loam till which covers this landscape unit is, for the most part, underlain by an extensive clay plain. Several drumlins are found in this area. A moderate amount of agricultural activity is evident. Relatively flat terrain and adequate forest cover make this unit particularly conducive to extensive recreation activities, such as snowmobiling and hunting, where other conditions are also suitable for such activities.

e) Mara Drumlin Field

Numerous drumlins and swampy areas with organic soils characterize this unit, most of which is underlain by a clay plain. Extensive agricultural activity has resulted in substantial forest clearance. The undulating topography and sparse forest cover restrict the unit's recreation potential to extensive activities. The area's pastoral appearance is aesthetically appealing for tourism activities/development.

2.1.4 Simcoe Plain

This relatively homogeneous physiographic unit is occupied by a single landscape unit of the same name. The Simcoe Plain, which occupies most of Innisfil Township, is characterized by a predominance of sandy loam soils underlain by a till plain. Numerous drumlins which dot the area represent a fringe area of the Peterborough drumlin field. High quality soils and level topography, aside from the drumlins, have resulted in extensive cultivation. The high agricultural productivity of this area limits potential for recreational and tourism development.

2.1.5 Carden Plain

Occupying part of Rama Township, this area was at one time under glacial Lake Algonquin as evidenced by several ancient beaches and sand deposits. The topography is quite flat with shallow overburden covering the underlying limestone plains. The soils of this unit are, for the most part, loams which offer good opportunities for agriculture, although the shallow depth to bedrock is a major constraint. This level, predominantly agricultural land, is most suited to limited types of extensive recreation.

2.1.6 Nottawasaga Basin

This lowland area, presently drained by the Nottawasaga River, was at one time flooded by ancient Lake Algonquin, as is evidenced by bordering shore ridges and beaches. The lower areas of the basin were also flooded by glacial Lake Nipissing which left extensive areas of lacustrine sand, silt and clay deposits.

In glacial times, a lake was formed in what is now the Minesing Swamp area, which was blocked off from Georgian Bay by the moraines around Elmvale. Eventually, the Nottawasaga River cut through the moraines enabling most of the area to drain. The Minesing Swamp has remained undrained due to its extremely low elevation.

The Minesing flats, which surround the swamp, and which were also once covered by the glacial lake, consist, for the most part, of poorly drained calcareous clay and some marl. The area east of Stayner is composed of a clay plain with areas of deep calcareous clay. Clay extends to the surface in some places and, in other areas, is overlain by sands. The area to the northeast of Elmvale is composed of deep and marly stratified clay which presents some drainage problems. Lying in between the Elmvale clay area and the Minesing flats are the till moraines which, at one time, caused the impoundment of the Minesing area. Sand plains and till plains cover the remainder of this physiographic unit. The following are the landscape units found within the Nottawasaga Basin physiographic unit:

a) Elmvale Plain

The major topographic features of this gently rolling terrain are the ancient shore ridges left behind by glacial Lake Algonquin. The soils are predominantly sandy loams underlain by clay plain, sand plain, till moraine and till plain in varying patterns. Suitable topography and generally well-drained soils support extensive agricultural activity throughout the area. This high agricultural productivity limits the recreational potential of the area. However, the pastoral setting augments the area's aesthetic suitability for tourism and recreational development.

b) Nottawasaga River Valley

This landscape unit, which extends from the Minesing Swamp to Wasaga Beach, crosses over two clay plains, a sand plain and a till moraine. The Nottawasaga River has cut a deep valley, up to 30 m deep, through the till moraine.

The soils are predominantly imperfectly drained clay loams. Large portions of the upland areas in the Nottawasaga River Valley are under cultivation. The Nottawasaga River is well suited to canoeing and small boating.

c) Minesing Wetlands

This unit, formerly occupied by a glacial lake, is predominantly lowland swamp with extensive organic soils. The swamp itself is bordered by a clay plain to the west and sand plain to the east. Small portions of this landscape unit are under cultivation. This area has some potential for extensive recreation activities such as hunting, hiking and wildlife viewing.

d) Stayner Plain

Occupying part of the Nottawasaga basin, this area is characterized by sandy loam soils and clay lacustrine deposits underlain by till plain. Agriculture accounts for much of the land use within this landscape unit. Extensive agricultural clearance has resulted in limited forest cover. The undulating topography against the backdrop of the Niagara Escarpment provides an interesting and scenic environment for tourism and recreation development.

e) Cornhill Moraine

The soils of this unit are predominantly silty loam underlain by till moraine. The pastoral nature of this unit, adjacent to the Niagara Escarpment, augments the area's aesthetic suitability for tourism and recreation development.

ij

f) Wasaga Beach

Modern beach deposits with a number of large parabolic dunes are the major landforms found in this landscape unit. The soils are, for the most part, sand or loamy sand. The extensive beach deposits form the basis of the area's tourism appeal.

g) Collingwood Shoreline

Loam soils underlain by sand plain and till plain are characteristic of this landscape unit. A small area of sandy outwash soils is evident near Collingwood. Several beaches and adjacent cottage developments consititute the recreational foci of this area.

h) Tiny Township Shoreline

Separated from the Elmvale Plain by a series of ancient shore bluffs and beaches, this landscape unit contains a number of modern beach deposits. The soils are predominantly loamy sand underlain by a sand plain. Cottaging related to water-based activities is very prevalent along this section of Nottawasaga Bay.

2.1.7 Niagara Escarpment

This physiographic unit extends from just south of Creemore to Camperdown on the shores of Georgian Bay. The escarpment, at this point, turns south to border the Beaver Valley and temporarily disappears at the edge of the Bighead Valley. Bordered on both sides by glacial features, this cuesta forms a striking landscape. The highest section of the entire Niagara Escarpment is found within the study area with a maximum elevation of 545 m above sea level. Two deep through-valleys divide this section of the escarpment. Both the Pretty River Valley and the Mad River

Valley occupy deep pre-glacial notches in the rim of the escarpment. At points along the escarpment, the hard dolomite cap forms cliffs of up to 45 m in height. Blocks breaking away from these cliffs have formed interesting caves. A mesa is evident on the section of the escarpment between Craigleith and Camperdown, protected by a hard cap of dolomite. Another interesting feature is the old Lake Algonquin shoreline which skirts the bottom of the escarpment near Blue Mountain. This former shoreline is evidenced by shore ridges and beaches. The soils and overburden along the escarpment vary in depth and are, for the most part, comprised of clay loam tills.

The magnificent scenery and varied topography along the escarpment make this area a valuable recreation and tourism resource. The steep slopes along certain sections of the escarpment are ideal for alpine skiing. Other popular forms of recreation along the escarpment include hiking, cross-country skiing, fishing and scenic viewing. The following six landscape units are found within the Niagara Escarpment physiographic unit:

a) Mad River Valley

The major landform within this landscape unit is the Mad River Valley, a deep, pre-glacial valley into which glaciers once extended. The northern end of the valley is blocked by a moraine which forces the Mad River to wind around to the south before heading towards Georgian Bay. A steep-walled scenic canyon, known as Devil's Glen, extends east from Singhampton. Just north of Singhampton, the cuesta reaches its highest point of 545 m in elevation. Where the topography permits, the generally loamy soils are conducive to agriculture (mainly livestock). Fishing and skiing are popular along this section of the escarpment.

b) Pretty River Valley

The Pretty River cuts the second pre-glacial notch into this portion of the escarpment. The soil texture is predominantly clay loam. Land adjacent to the escarpment is extensively farmed. This prominant valley associated with the abrupt cuesta on both sides represents a magnificent scenic resource.

c) Blue Mountain

At this point along the escarpment, the cuesta becomes a striking topographic feature dramatically contrasted by Georgian Bay. The highest vertical rise of the escarpment occurs in this section. The soils are predominantly loam with dolomitic outcrops occurring at many points along the brow. Numerous caves, which are the result of crumbling dolomite blocks, are located in this section of the escarpment. Steep slopes have proven to be a major constraint to agricultural activity. This landscape unit provides one of the major alpine skiing areas in the province.

d) Ravenna Slopes

The Ravenna Slopes begin at the point where the escarpment turns south to skirt the Beaver Valley. At this point, the escarpment becomes much less abrupt. The underlying landform is a shale plain at the base of the escarpment. Soils are predominantly clay loam. Much of this landscape unit is under cultivation and pasture. Agriculture takes precedence over recreation along this section of the escarpment.

e) Beaver Valley Slopes

The escarpment, at this point, extends around the southern extremity of the Beaver Valley. The slopes are steep with less vertical rise (maximum 183 m) than the Blue Mountain section (maximum 250 m). The clay loam soils predominant in this section are prone to erosion. The steep slopes have precluded widespread agricultural development, but are extremely conducive to alpine skiing.

f) Euphrasia Slopes

The slopes flatten out somewhat along this section of the escarpment making this area more suitable for cultivation and pasture. Clay loam is, again, the dominant soil texture. Extensive cultivation severely limits the areas recreational potential.

2.1.8 Beaver Valley

This valley occupies an area of approximately 190 sq. km extending almost 35 km from Thornbury to Flesherton. The valley was cut by the predecessor of the Beaver River. This glacial stream was a tributary of the ancient river which carved the depression of Georgian Bay. Glaciers advanced up this valley, possibly several times, leaving a steep-sided, broad-bottomed valley opening into Georgian Bay. A temporary halt in the recession of the ice left a till moraine across the valley just north of Heathcote. When the glacier receded further, the valley was filled by a lake which deposited a till plain over the valley. Several drumlins are located in the valley as well. Tow lines of ancient shore ridges and beaches, formed by glacial Lakes Algonquin and Nipissing, are located at the valley mouth along Georgian Bay.

Within the Beaver Valley, the soils are predominantly clay loam till. A large area of sandy outwash exists at the mouth of the Beaver River adjacent to Georgian Bay. This physiographic unit has been divided into the following two landscape units:

a) Upper Beaver Valley

The soils in this section of the valley are predominantly clay loam underlain by a lacustrine clay plain deposit. Agricultural land use is not extensive due to the imperfectly drained soils and flood plain conditions. The Beaver River is suitable for canoeing and some small boating.

b) Lower Beaver Valley

The soils in this section of the Beaver Valley are predominantly clay loam. A large area of sandy outwash soils exists at the mouth of the Beaver River. The underlying landforms are till plain, a small area of till moraine and a sand plain area at the mouth of the Beaver River. Several drumlins are situated near Victoria Corners. A considerable portion of the valley is under cultivation and pasture. Apples are the most significant crop. The major recreational focus is on the Georgian Bay shoreline, contrasted by the agricultural uplands which are seen against the escarpment in the background.

2.1.9 Horseshoe Moraines

Large portions of the Townships of Euphrasia, Artemesia, Collingwood and Osprey are covered by a complex of till ridges, kame moraines, spillways, till plains and drumlins. The generally well-drained tills in the area are commonly loamy with numerous dolomite stones and boulders. Local relief can vary as much as 30 m between till plain and drumlins. Many small lakes and rivers and swampy areas characterize the area.

The following landscape units are found within the Horseshoe Moraines physiographic unit:

a) Kolapore Uplands

The predominantly silty loam soils of the Kolapore Uplands are underlain by a limestone plain and several till moraines. Several drumlins are situated in this landscape unit. Agriculture has been restricted by the bouldery and stony nature of the soil and by extensive swamplands. Hunting and hiking are popular recreation activities in this area.

b) Beaver and Mad River Uplands

Till plain underlies most of this unit, although several areas are underlain by till moraine and spillway deposits. Soils are generally well-drained silty loam which supports several important agricultural areas. The area is suited to extensive recreational activities.

c) Osprey Wetland

The Osprey Wetland area consists primarily of swamps and bogs with organic soils. Several eskers extend through the area. Agricultural activities are generally restricted to the limited mineral soils. Recreational uses could potentially include hunting and wildlife viewing.

d) Saugeen River Upland.

This landscape unit is covered by a complex of till plains, till moraines, kame moraine, spillways, several drumlins and several eskers. The soils are predominantly silty loam although several large areas of organic soil exist. Several important agricultural areas are found within this landscape unit. The area's tourism potential is generally limited to

extensive recreation forms. More intensive activities and development are precluded by the high agricultural capability of certain areas and by extensive areas of swampland.

e) Rocklyn Plain

This landscape unit is underlain by a till plain bordered by till moraines. Several drumlins also exist. The loamy soils are generally well-drained, although one large swamp area with organic soil is located within this unit. A significant portion of this area is under cultivation or pasture. Extensive recreational activities such as hiking and cross-country skiing are well suited to this landscape unit.

2.1.10 Bighead Valley

This valley, which is not as well defined as the Beaver Valley, extends southwest from Meaford, and is close to 13 km at its widest point. Like the Beaver Valley, this valley was largely formed during pre-glacial times, and was only slightly modified by glaciers. The valley is covered by several hundred drumlins extending in a north-south direction, indicating that the ice lobe moved directly across the valley. After the ice receded, the old shoreline of glacial Lake Algonquin formed a barrier beach across the mouth of the valley. This barrier resulted, at some point in time, in a lake being impounded in the valley, with the resultant deposition of large amounts of silt and sand on the valley floor.

The drumlins are formed from well drained stony clay loam, in contrast to the sandy loam soils overlying most of the valley. Near the Algonquin shoreline, there are several poorly drained swampy areas. The former Lake Nipissing shoreline is also evidenced across the mouth of the valley by shore bluffs and beaches.

The Bighead River drains the valley into Georgian Bay. Agricultural land use is widespread throughout the valley and restricts recreation to certain areas such as the shoreline or along the Bighead River.

2.1.11 Cape Rich Steps

In pre-glacial times, this area formed the upland between two tributary river valleys of the glacial river which formed Georgian Bay. From the bay, the land rises as much as 150 m in a series of five steps. The first two are the shore bluffs of ancient Lakes Nipissing and Algonquin. The next level is formed by Queenston shale in a gentle slope leading up to the dolomite. The next step is the mesa located halfway between the tip of Cape Rich and Meaford. The final step is formed by the brow of the Niagara Escarpment which extends through this area.

The lower two steps are cut in shale and are covered by bouldery beach terraces. In certain areas, stratified clay occurs on the second terrace. Most of the area is covered by clay till of varying thickness. Both agricultural and recreational activities are extremely limited due to the fact that most of this area is owned by the Canadian Armed Forces.

DRAWING NO. 2

PHYSIOGRAPHIC/LANDSCAPE UNITS

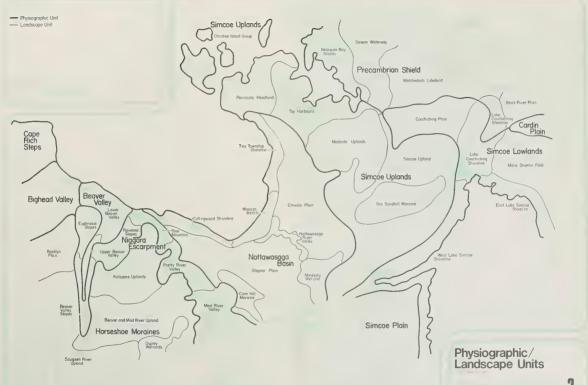




FIGURE 1

BIOPHYSICAL LANDSCAPE UNIT INVENTORY



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2.2 Climate

Climate and weather directly control or influence almost every outdoor activity, and are, therefore, important considerations in tourism planning. In this section, various pertinent climatic factors which affect summer and winter recreation activities are discussed.

The study area contains the following three climatic sub-regions: Southern Georgian Bay, Dundalk Uplands, and Simcoe; all of which fall within the Southern Ontario Climatic Region. Variations between these sub-regions are minimal and, as a result, they have been treated as one in the following discussion.

The area has a humid continental climate characterized by cold winters of four and one half to five months duration and warm summers of six and one half to seven months duration. The mean daily July temperature is between 17.8°C and 24.0°C, that for January is -6.7°C to -7.8°C and the mean daily annual temperature is from 5.6°C to 6.7°C. The average annual precipitation varies from 78.5 cm to 103.6 cm with approximately 33% of the precipitation falling as rain from June through September, and another 30% falls as snow between December and March. For snowfall, a conversion factor of 0.1 is used to produce a numerical equivalent to liquid precipitation. Thus the mean annual snowfall across the study area varies between 240 cm and 300 cm. 1,2,3)

2.2.1 Summer Conditions

Within the study area, as in Ontario generally, summer tourism and recreation activities are strongly water-oriented and swimming is of primary importance. Thus, the characteristics of the summer recreation season, especially the swimming season, should be examined closely. (See Table 1).

The swimming season, with water temperatures of 19°C or over, is fairly lengthy in southern Georgian Bay, lasting about 90 days beginning about the end of June and ending in late September. (Only the southernmost parts of the province near southern Lake Huron and Lake Erie have longer swimming seasons). Around Lake Simcoe, the swimming season is slightly shorter, 80 to 85 days, beginning in late June and ending in mid-September. Due to its greater size, the water temperatures of Georgian Bay peak later and drop off more slowly than those of inland lakes. Enclosed and sheltered bays within the large water bodies, and shallow inland lakes often have longer swimming seasons than those mentioned above; however, the advantage of a longer season is often negated by less appealing water quality conditions which generally characterize warm, shallow waters.

The study area has a slightly longer swimming season than the nearby tourist areas of Muskoka and Haliburton which have swimming seasons of between 75 and 80 days, from late June to early or mid-September.

TABLE 1

MEAN WATER TEMPERATURES (°C)*

AT SELECTED LOCATIONS 1)

	Collingwood	Balm Beach	Orillia	Meaford
June 15	15.6	15.6	15.6	15.6
June 15	16.6	18.3	19.4	13.9
July 5	18.9	20.6	21.7	15.6
July 15	20.0	22.8	22.2	15.6
July 25	21.7	22.8	23.9	19.4
Aug. 5	22.8	22.8	23.3	20.6
Aug. 15	22.2	22.2	22.8	20.6
Aug. 25	21.1	21.1	21.1	20.0
Sept. 5	19.4	19.4	19.4	18.9
Sept. 15	17.8	17.8	17.8	17.2
Sept. 25	17.2	17.2	17.2	16.1

^{*} Temperatures are metric equivalents of temperatures recorded in degrees Fahrenheit. 1)

The study area also has a lengthy summer season (maximum daily temperatures over 18°C) during which vigorous activities (hiking, hunting, sailing, canoeing, tennis, etc.) and passive activities (angling, motor boating, sunbathing, etc.) can take place.

During the spring and autumn shoulder seasons, these activities are more likely to be constrained due to unsettled or unsuitable weather conditions.

Within the study area, the summer season lasts for 200 to 210 days (from the end of May to the end of September), the spring shoulder between 20 to 40 days, and the autumn shoulder about 50 days. The Haliburton and Muskoka areas have similar season lengths, although, as mentioned earlier, their swimming season is somewhat shorter.

An important consideration is the reliability of favourable summer weather conditions. The percentage occurrence of below normal summer temperatures in the study area is less than 20%. However, in areas to the south and north-west, the occurrence is less than 10%. The study area is subject to occasional cool spells when the large water mass of Georgian Bay cools the air masses which largely govern the study area's weather. Strong winds are rarely a problem, averaging only 8 to 11 kph during the summer. Peak gusts of 48 or 64 kph coincide with thunderstorms which occur an average of 15 times each summer.

2.2.2 Winter Conditions

During the winter, outdoor recreation activities generally require the presence of an adequate and reliable snow and/or ice cover. Popular winter activities in the study area include downhill and cross-country skiing and snowmobiling for which a depth of at least 15 cm (6 inches) of snow is required. The period of reliable snow cover lasts 40 to 50 days from the beginning of January to mid-February and the period of marginally reliable snow cover (during which snow making is possible) begins in mid-

December and ends in mid-March. The Muskoka and Haliburton areas have a marginally longer reliable season for winter activities than other parts of the study area. The season here begins earlier (mid-December) and also ends in mid-March. It is a rare occurrence (less than 2% of the time) when low temperatures and extreme wind chill factors prevent participation in snowmobiling or skiing.

In summary, the Collingwood-Midland-Orillia tourism zone has a favourable balance of winter and summer weather conditions. By most central and eastern Canadian standards, the summer is long and warm. There are extended fall and spring shoulder seasons accommodating a wide variety of passive and vigorous activities, both land and water-based. Winter recreation conditions are relatively good. The duration of adequate snow and/or ice cover is longer and more reliable than in areas to the south but not as long or as reliable as in areas to the north. A summary of the beginning and ending of lengths of season for various regions within the study area is given in Table 2.

TABLE 2

SUMMARY OF BEGINNING, ENDING AND LENGTH OF SEASONS
FOR REGIONS WITHIN THE STUDY AREA¹⁾

	Southern Georgian Bay	Grey County	Lake Simcoe Couchiching	<u>Muskoka</u>	Haliburton West
Beginning of Winter	mid Nov.	early Nov.	mid Nov.	mid Nov.	mid Nov.
Ending of Winter	early April	early April	early April	early April	early April
Length of Winter (months)	$4\frac{1}{2}$	5	4½	5	5½
Time of Spring Thaw	mid April	mid April	mid April	mid April	mid April
Beginning of Spring Shoulder	mid April	late April	mid April	late April	late April
Length of Summer (months)	7	6½	7	7	6½
Beginning of High Summer	late May	late May	mid May	late May	mid May
Ending of High Summer	late Sept.	mid Sept.	late Sept.	late Sept.	mid Sept.
Length of High Summer (months)	4	4	4½	4	41/2
Length of Spring ' Shoulder (months)	$1\frac{1}{2}$	1	1	1	1^{1}_{2}
Length of Autumn Shoulder (months)	2	1^{1}_{2}	$1^{\frac{1}{2}}$	2	1^{1}_{2}

2.3 <u>Significant Resources</u>

The following section presents a brief summary of existing extractive industrial development and extractive resource potential within the Collingwood-Midland-Orillia area. Mineral aggregate extraction, agriculture and forestry industries are considered here as they relate to potential land use conflicts with the tourism and recreation industry and competition for available land resources.

Mineral aggregate extraction is expected to play a more important role in counties such as Simcoe and Grey in the near future. Increasing demand for sand, gravel and crushed stone in the major urban areas to the south has depleted the more convenient local sources and increased the likelihood of a move towards more northerly aggregate supplies. Other mining activities do not constitute a major industry within the study area.

Agriculture is the most important industry in the study area. The abundance of prime agricultural land supports a diverse agricultural industry which produces specialty crops such as asparagus and apples which require special soil and climatic conditions, as well as more common crops (corn, soybeans) and livestock, dairy and poultry products.

The forestry industry is also prevalent throughout this region.

Common products include firewood and Christmas trees as well as a major supply of hardwood lumber used by the furniture industry.

2.3.1 Mineral Aggregate Resources

In December 1975, the Ontario Mineral Aggregate Working Party was appointed by the Ontario Government to assess the aggregate resource situation in Ontario. This Working Party came to the conclusion that "potentially" available aggregate resources within the Province should satisfy demand until at least 2025. 1)

Potential aggregate reserves are projected quantitative estimates based upon the geological character of the deposit and the assumption that known deposits will continue or repeat themselves within similar geological conditions. Potentially available aggregate consists of those supplies which are available for extraction within the context of existing extraction constraints. Thus, the potentially available aggregate is derived by subtracting the aggregate restricted from extraction by physical and/or legislative controls from total estimated aggregate reserves or possible reserves.

Physical extraction constraints determined by consultants in a mineral aggregate study $^{2,3)}$ include depth of overburden, water courses, projected future development, and major conflicting land uses such as major power transmission lines.

Legislative restrictions include municipal or regional zoning by-laws, official plans and provincial statutes such as the Pits and Quarries Control Act. (Additional legislation, including the Beach Protection Act and the Niagara Escarpment Planning and Development Act may further restrict aggregate supplies within the study area, but was not considered in the consultant's studies).

It was found that, when the above restrictions were applied to individual aggregate deposits, between 4% and 50% of total estimated possible reserves were available for extraction. Extrapolating, within the study area potential available reserves represent between 4% and 50% of possible aggregate reserves.

Because of the nature of the above-mentioned investigation, further study would be required to substantiate both the quantity and quality of potential aggregate reserves and their ability to meet existing and future demands in the construction industry.

A mineral aggregate study for the Central Ontario Planning Region conducted in 1974^2 classified township sand and gravel requirements (based on possible reserves) in a very generalized manner for current and future requirements. These requirements are as follows:

- Townships containing possible reserves from .9 to 9 million metric tons (1 to 10 million tons) should have sufficient gravel for current requirements.
- Possible reserves of 9 to 45 million metric tons (10 to 50 million tons) should enable a township to meet future requirements.
- Possible reserves above 45 million metric tons (50 million tons) should enable the township to supply the needs of adjacent areas which are deficient in gravel.
- Townships with possible reserves in excess of 90 million metric tons (100 million tons) should be able to sustain large continuous pit operations for at least the foreseeable future. ²⁾

It is evident from this report that the townships of Artemesia and Osprey and possibly Nottawasaga should have adequate supplies for continuous pit operations, (i.e., for use outside of local needs). The quality of the deposits in Artemesia requires further investigation. The sand and gravel deposits in Osprey Township, although seemingly plentiful, are widely scattered and also generally of poor quality. The reserves in Nottawasaga Township require further study to determine more accurately, their quantity and quality. The Townships of St. Vincent, Euphrasia and Collingwood have the capacity to become important suppliers on the local and regional scale.

Euphrasia and Orillia townships stand out as potential suppliers of crushed stone, over and above local needs. Nottawasaga could also become a major supplier if extraction restrictions were lifted from the Niagara Escarpment area.

In conclusion, the Townships of Euphrasia, Artemesia, Orillia and possibly Nottawasaga, may play an important future role in satisfying the growing aggregate needs of Southern Ontario. However, high transportation costs resulting from the relatively long distances between quarry and market are a considerable problem. Economies of scale and transportation costs must be achieved to enable these areas to become competitive suppliers. As well, demand patterns must be predicted so that an adequate lead time can be achieved for the planning of necessary transport facilities.

The remaining townships within the study area are not likely to play a significant part in the supply of aggregates to other regions although they do have to satisfy local demands as far as possible. Therefore, it is essential that, where possible, potential supplies of aggregate within each township are preserved to satisfy future local needs.

The approximate locations of possible reserves within Simcoe County are plotted on Drawing 3 as delineated in the Georgian Bay Task Force Report. The areas delineated in Grey County are taken from a 1977 mineral aggregate study report for the Southwestern Region. ³⁾ Although they are not represented on the map, small wayside pits cannot be overlooked for their value in local projects such as road building, and should, therefore, be identified in site specific planning projects.

Table 3 outlines the estimated possible aggregate resources of each township within the study area.

DRAWING NO. 3





TABLE 3

ESTIMATED POSSIBLE AGGREGATE RESOURCES

(In millions of tons)

GREY COUNTY

Township	Sand & Gravel	Crushed Stone
Artemesia	429.5 (Outwash terrace and ice contact deposits)	None (deep overburden)
Collingwood	36.4 (Kame & beach deposits)	411.2 (Amabel dolomite)
Euphrasia	33.0 (Outwash & kame)	2,198.8 (Amabel dolomite)
Osprey	132.6 (Esker, kame and outwash deposits)	41.6 (Amabel dolomite)
St. Vincent	19.9 (Beach deposits)	727.9 (Amabel dolomite)
SIMCOE COUNTY		
Flos	15.0 (Beaches and sand plain)	None
Innisfil	4.0 (Beaches and sand plain)	None
Matchedash ,	0.1 (Beaches and sand plain)	None
Medonte	4.1 (Beaches, kame moraine and sand plains)	450 (Paleozoic limestone)

TABLE 3 CONTINUED

Township	Sand & Gravel	Crushed Stone
Nottawasaga	75 (Spillway beaches and sand plains)	1,250 (Escarpment)
Orillia	g (Beaches and sand plains)	750 (Paleozoic limestone)
Oro	40 (Kame moraine, beaches and sand plains)	None
Sunnidale	15 (Beaches and sand plains)	none
Tay	5 (Beaches and sand plains)	500 (Paleozoic Iimestone)
Tiny	13 (Beaches and sand plains)	200 (Paleozoic Himestone)
Vespra	10 (Kame moraine, beaches and sand plains)	None
Mara	0.2 (Sand plains)	600 (Beaches)
Rama	0.2 (Sand plains)	300
DISTRICT OF MUSKOKA		
Baxter	None	100 (Beaches & Granite)

Multiply Imperial tons by a factor of .907 to derive equivalent metric ton values.

2.3.2 Agricultural Resources

a) Existing Agricultural Land Use

Agriculture constitutes a very important industry within the study area in terms of employment, land use and overall character. The predominant agricultural land use within this region is mixed livestock production and the associated field crops which form the basis for livestock feed.

Special soil and climatic conditions within the study area accommodate numerous specialty crop areas. Drawing 3 delineates areas where the four most important specialty crops apples, asparagus, strawberries and potatoes - are grown. Table 4 indicates the approximate areas occupied by these four specialty crops. Large contiguous blocks of potato farms are found in Sunnidale, Innisfil, Flos and Medonte Townships, while potatoes are also grown to a lesser extent in Osprey and Tiny Townships. Apples, asparagus and strawberries are found in Nottawasaga, Collingwood, St. Vincent and Euphrasia Townships. Small quantities of asparagus are grown around the Barrie area as well. It must be remembered that areas outlined on the map are generalized, as certain fields may be rotated to other crops at certain times, specifically in the case of potatoes. Also, there may be many other small isolated fields of specialty crops throughout the study area. 4,6) Other common cash crops include flax, winter wheat and barley.

Within the five townships of Grey County which fall within the study area, the most common agricultural activity is beef cattle production, most of which takes the form of cow-calf operations. The next most common livestock operation is hog farming. Dairy cattle, as well, are beginning

to play an important role in this area. The predominant cash crops are specialty crops such as apples. The unique micro-climatic effects of the Niagara Escarpment and the proximity to Georgian Bay enable the townships of St. Vincent and Collingwood to be two of the largest apple producing areas in the province. Other specialty crops in this area include strawberries, asparagus and some potatoes. 4,7)

Mixed livestock is the major agricultural activity in Simcoe County. Dairy, beef and hog production form the bulk of the livestock industry. The township of Nottawasaga is among the leading beef production areas in the province. Sheep production is beginning to play an important role in this area as well. As in Grey County, the majority of locally grown field crops are marketed for livestock feed. The predominant cash crop is grain corn, although soybeans are beginning to gain importance.

The northerly townships of Simcoe County are considered fringe areas for the growing of grain corn and soybeans because of marginal and unreliable climatic conditions. However, the introduction of new early-maturing varieties has greatly increased the area's agricultural potential. Several specialty crops such as potatoes in Flos Township and apples in Nottawasaga, are very important to the agricultural economy of the area. Other specialty crops include strawberries, asparagus and maple syrup. Simcoe County is one of the top five maple syrup producing counties in the province. ^{6,7})

TABLE 4

APPROXIMATE AREAS OCCUPIED BY SPECIALTY CROPS*4,6)

Apples	2,428	ha
Asparagus	202	ha
Potatoes	1,214	ha
Strawberries	40	ha

^{*} Only the large contiguous blocks of specialty crops have been mapped.

b) Agricultural Land Use Policy

In 1978, the Government of Ontario issued a policy statement on agricultural lands entitled "The Food Land Guidelines". It was stated in these Guidelines that lands with agricultural potential constitute the following:

- I. Lands with capability for growing specialty crops.
- 2. All Class 1, 2, 3 and 4 lands.
- 3. Areas where farms exhibit characteristics of on-going viable agriculture outside of Class 1, 2, 3 and 4 lands.
- 4. Areas where local market conditions create a viable agriculture outside of Class 1, 2, 3 and 4 lands. 9)

It is stated within the Guidelines that any municipalities with official plans not conforming to the Guidelines will be encouraged to update and revise their official plans so that they come into conformity with the Guidelines.

Table 5 summarizes the distribution of soil classes within the study area by county, and as a percentage of the study area. Table 6 presents a further breakdown of this distribution according to township. Drawing 3 depicts the location of Class 1 and 2 agricultural lands according to the Canada Land Inventory.

Almost 50% of Grey County consists of Class 1 and 3 soils, while the rest is predominantly non-arable. Simcoe County has a more even distribution of arable soils classes, and only 36.9% of land with severe or insurmountable agricultural constraints.

Nottawasaga, Innisfil, Sunnidale, Flos and Medonte Townships have the greatest acreages of arable land and soils suited to specialty crops.

The portion of the study area which lies within the District of Muskoka has the lowest percentage of arable land, and no Class 1, 2, 3 or 4 land. Nevertheless, there are viable farm units within this area which sould be preserved. $^{8)}$

TABLE 5

SUMMARY OF SOIL CAPABILITY FOR AGRICULTURE 9)

	Grey	County*	Simco	e County*	Study Area		
	%	area	00	area	90		
Class 1	26.6	33,728 ha	13.1	45,403 ha	16.1		
Class 2	4.0	5,670 ha	18.1	62,818 ha	14.0		
Class 3	22.8	32,543 ha	19.0	66,036 ha	20.1		
Class 4	6.1	8,7 <u>0</u> 3 ha	12.9	44,862 ha	10.9		

^{*} These statistics include only those townships which fall within the study area.

TABLE 6

SOIL CAPABILITY FOR AGRICULTURE BY TOWNSHIP

County	Township	Soil Class	Total Acreage	% of Total Township Acreage
Grey	Artemesia	1 2 3 4	23,885 (9666 ha 2,625 (1062 ha 14.615 (5914 ha 1,165 (471 ha) 3.7) 20.8
	Collingwood	1 2 3 4	15,780 (6386 ha 5,055 (2046 ha 18,970 (7677 ha 4,970 (2011 ha) 7.3) 27.5
	Euphrasia	1 2 3 4	10,340 (4184 ha 3,135 (1296 ha 13,790 (5580 ha 5,380 (2177 ha) 4.1) 18.3
	Osprey	1 2 3 4	21,395 (8658 ha 1,150 (465 ha 17,815 (7209 ha 1,605 (649 ha) 1.6) 24.8
	St.Vincent	1 2 3 4	11,940 (4832 ha 2,045 (828 ha 15,200 (6151 ha 8,385 (3393 ha) 3.1) 22.9
Simcoe	Flos	1 2 3 4	14,890 (6026 ha 18,260 (7389 ha 10,375 (4199 ha 8,900 (3602 ha) 28.1) 16.0
	Innisfil .	1 2 3 4	32,195 (13029 ha 1,435 (581 ha 13,945 (5643 ha 8,285 (3353 ha) 2.0) 19.7
-	Mara	1 2 3 4	8,658 (3504 ha 18,414 (7452 ha 7,487 (3030 ha 6,112 (2473 ha	29.3
	Matchedash	1 2 3 4	2,260 (915 ha 130 (53 ha	

TABLE 6 CONTINUED

	Medonte	1 2 3	780 (316 ha) 19,805 (8015 ha) 23,955 (9694 ha)	1.1 27.3 11.5
	Nottawasaga	1 2 3 4	26,023 (10531 ha) 8,727 (3532 ha) 25,314 (10244 ha) 8,223 (3328 ha)	27.5 9.2 26.8 8.7
	Orillia	1 2 3 4	4,575 (1851 ha) 11,670 (4723 ha) 15,045 (6088 ha) 7,935 (3211 ha)	5.7 14.6 18.9 10.0
	Oro	1 2 3 4	14,180 (5738 ha) 12,190 (4933 ha) 11,275 (4563 ha) 7,935 (3211 ha)	18.5 15.9 14.7 12.9
	Rama	1 2 3 4	121 (49 ha) 5,464 (2211 ha) 1,367 (553 ha) 4,223 (1709 ha)	0.3 13.7 3.4 10.4
	Sunnidale	1 2 3 4	4,769 (1930 ha) 19,476 (7477 ha) 11,750 (4755 ha) 8,290 (3355 ha)	9.6 37.3 23.7 16.7
	Tay	1 2 3 4	152 (62 ha) 9,769 (3953 ha) 12,003 (4857 ha) 4,683 (1877 ha)	0.3 20.9 25.7 9.9
	Tiny	1 2 3 4	1,625 (657 ha) 19,405 (7853 ha) 14,330 (5799 ha) 26,125 (10572 ha)	1.9 22.6 16.7 30.4
	Vespra	1 2 3 4	4,221 (1708 ha) 11,607 (4697 ha) 14,068 (5693 ha) 9,767 (3953 ha)	6.4 17.6 21.4 14.8
District Municipality of Muskoka	Portion of Georgian Bay Township which was Baxter Township	1 2 3 4		

2.3.3 Forest Resources

The entire study area, except for the extreme northern portion, falls within the Huron-Ontario section of the Great Lakes-St. Lawrence Forest Region, a region characterized by forests of a very mixed nature. Since the area is well-settled and substantially cleared for agriculture, very few extensive forest tracts remain. Scattered woodlots of varying sizes dotted across the irregular but frequently plain-like topography typifies the land-scape. The largest remaining forest areas occur generally along the major river and stream valleys, the Niagara Escarpment and the northernmost townships.

Sugar maple and beech are common on the uplands over the entire area, mixed with basswood, white and red ash, yellow birch, red maple, and red, white and bur oak. Interspersed with these dominant hardwood species are inclusions of eastern hemlock, white pine and balsam fir, as well as scattered largetooth aspen, and trees which are more common to the southernmost parts of Ontario such as butternut, bitternut hickory, hop hornbeam, black cherry, sycamore and black oak. Lowlands, such as rivervalley bottoms and swamp sites support such species as blue beech, silver maple, slippery and rock elm, and black ash. Eastern white cedar is present in swampy depressions and old fields.

The northernmost edge of the study area is part of the rough and irregular Precambrian Shield with its thin layer of glacial till. The major forest trees are sugar maple, beech, basswood, yellow birch, eastern hemlock, red maple and white ash. Coniferous trees are noticeably more numerous - eastern hemlock, white pine, white spruce, balsam fir and Jack pine. As well as the large trees, there is a luxuriance of understorey growth composed of smaller trees, shrubs and vines and an abundance of herbaceous plants.

The study area contains some of the most productive and highly valued forest lands in the province despite the small size of most forest tracts. The hardwood forests of southern Ontario are the main source of wood for Ontario's furniture companies and veneer producers who use this hardwood lumber for cabinetry and plywood. Maple comprises by far the greatest percentage of the harvest, while the remainder is composed of relatively small quantities of ash, cherry, beach, oak and pine.

Approximately 6% of the southern Ontario population is involved in the forest industry and a similar proportion is likely employed in the forest industry within the study area, either on a full or part-time basis. Forestry-based activities include logging, saw-milling, and furniture and veneer production. Other wood products include cedar fence posts and pulpwood bolts. In addition, the increasing cost of fossil fuels and the growing popularity of fireplaces and wood stoves, is increasing the demand for firewood from the region's woodlots.

The value of forest products from farm woodlots in southern Ontario has declined from \$5.4 million in 1960 to \$3 million in 1965, rising to \$4 million in 1970. The value of wood and forest products from the study area is not known at this time.

Specific information regarding productive forest acreage, production, and employment within the study area is difficult to assess. Forestry data is compiled according to individual districts of the Ontario Ministry of Natural Resources (MNR); however, the study area covers only portions of three of these districts. Nevertheless, Huronia District, which includes all of Simcoe County, and hence, 80% of the study area, gives a reasonably accurate representation of forest resources within the Collingwood-Midland-Orillia Tourism Zone.

Approximately 16% of the study area (85,350 ha) consists of productive forest of which 24,425 ha are either owned or managed by MNR in the form of Crown Land or agreement forests owned by counties and conservation authorities. Another 8,886 ha are managed by MNR under Woodlot Improvement Act agreements with private landowners. In 1978, the Crown Lands and agreement forests produced about 4,554 cords of pulpwood, 1,113 cords of fuelwood, 5,646 pole-length pieces and 48,840 foot board measures (fbm) of saw-logs. Production from privately owned woodlots has been over 1.5 million fbm annually. Further, there are about 100 sugar maple operations each of which produces between 50 and 1,200 gallons (228 - 5460 litres) of maple syrup annually. Christmas tree farms are both extensive and economically important in Tiny and Oro Townships.

The forest industry (excluding maple syrup operations and Christmas tree farms) employs approximately 500 persons and supports a secondary wood industry which employs another 1,000 people.

Drawing 3 indicates primary areas of wood extraction within Crown owned, controlled and managed lands. As can be seen, the townships of Tiny, Tay and Matchedash are heavily Crown controlled and are major potential sources of forest products.

2.4 Environmentally Sensitive/Significant Areas

This section provides an overview of the significant biophysical resources and environmentally sensitive areas, within the Collingwood-Midland-Orillia Tourism Zone.

Areas considered to be sensitive or significant have been divided into six general categories:

- 1. Significant Natural Areas and Wildlife Complexes
- Significant Natural Areas and Wildlife Complexes -Crown Land
- 3. Avian Habitats
- 4. Fisheries
- 5. I.B.P. Sites
- 6. E.S.A.'s (Environmentally Sensitive Areas)

2.4.1 Significant Natural Areas and Wildlife Complexes

Included within this category are tracts of largely unregulated land where significant vegetation features, geomorphic features, or wildlife complexes have been identified. These areas are mainly privately owned but some may contain Crown Land where some management does occur.

Wildlife complexes are areas with a higher than average diversity of habitats and hunting potential. (17) These areas encompass many interrelated habitats which support a variety of wildlife species. The presence of substantial populations of either ruffed grouse, American woodcock or white-tailed deer has been used to indicate the location of wildlife complexes. These areas are often very important to the cortinued survival of certain species. They may contain deer wintering yards, heronries, or any other habitat where wildlife are concentrated during certain seasons.

In agrarian townships such as Nottawasaga, size and diversity of wildlife populations are relatively low, although wildlife is still present. European hares are common in many of these agricultural areas. 13

The following sections provide a general description of the larger wildlife complexes. Some of the areas to be described below have been designated by the Division of Parks, MNR in 1976 for the Niagara Escarpment Commission as Candidate Nature Reserves. 11)

They may eventually be acquired by MNR for development as Nature Reserve Provincial Parks. The entire Niagara Escarpment Planning Area (N.E.P.A.) was surveyed for areas which qualified for designation as Nature Reserves according to criteria such as representation, uniqueness, habitat diversity, quality and condition, homogeneity, size, buffering capacity, rare species, and species of biogeographical interest.

The actual boundaries of these Candidate Nature Reserves as indicated on Drawing 4 are approximate: they indicate the extent of the natural area, and do not imply any proposed or existing ownership boundaries.

Meaford Tank Range

The Meaford Tank Range is one of the most important wildlife areas in the western half of the study area. Its 7,285 hectares (18,000 acres) of abandoned farmland in early successional stages provide excellent wildlife habitat. The presence of unexploded artillary shells prohibits public access, the absence of which further enhances the area's potential as a "game reserve". It has a large deer population and two important wintering yards. Mountain Lake supports good waterfowl populations. Diving ducks and loons frequent the offshore areas away from cottage development.

A portion of the Meaford Tank Range, the Cape Rich - Sucker Creek Valley area has been designated as a Candidate Nature Reserve. The presence of significant earth science features (both escarpment and Lake Algonquin-related) augments the importance of this site although significant life science aspects are also present.

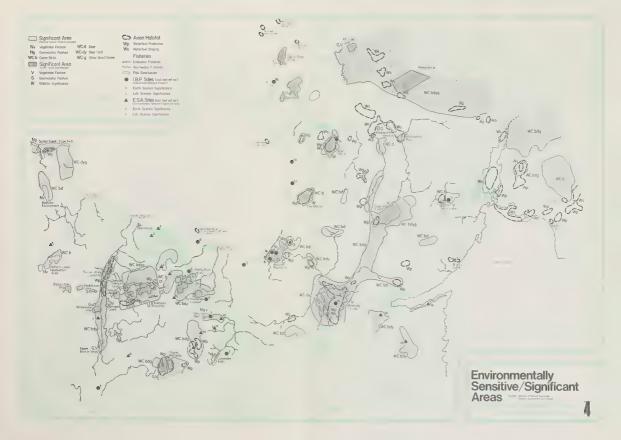
Bayview Escarpment

This is a Candidate Nature Reserve representative of the escarpment slope, upland deciduous forest and swamp forests. The area contains excellent examples of highly productive lowland forest.

Walter's Creek Headwater Area

Wildlife and water features of this Candidate Nature Reserve 11) may be more important than the vegetation, although the area contains a rich cedar swamp. It is the recharge area for springs which feed Walter's Creek.

DRAWING NO. 4





Niagara Escarpment

The Niagara Escarpment acts as a corridor for wildlife movements throughout the western study area. The relative lack of development and the diversity of habitats along this important feature make it extremely attractive to deer and other smaller upland game species. Within this feature, a number of smaller areas have been deemed worthy of individual consideration. These are Duncan Lake South, Kimberley Creek, Lavender Falls, and the Pretty River Valley.

Duncan Lake South

A rich deciduous upland forest, mature cedar swamps and various lakeshore associations are the most significant features in this natural area, and qualify it for designation as a Candidate Nature Reserve.

Kimberley Creek

This is a forested escarpment section with a number of fissure ravines paralleling the cliffs. It is considered to be an excellent representation of upland forest, with typical fern-bryophyte ground vegetation in the ravines. For these reasons it has been designated as a Candidate Nature Reserve.

Kolapore Uplands

The Kolapore Uplands, in Collingwood Township, which consist of an extensive, continuous tract of beaver-flooded forest is an important deer wintering area. It is also reputed to be one of the best ruffed grouse areas in Grey County.

Osprey Wetlands

The Osprey wetlands, located in Osprey Township, south of the Kolapore Uplands, serve an extremely important hydrological function as the headwater area for the Saugeen, Beaver, Mad and Grand River systems. These wetlands are also important for waterfowl production, game birds and deer habitat.

Lavender Falls (Noisy River Valley)

This area has been identified by the Parks Branch of MNR ¹¹⁾ as containing significant life science features. It is a forest area representative of small incised river valleys, and has been recommended for designation as a Candidate Nature Reserve. The area is adjacent to the existing Lavender Falls Conservation area.

Pretty River Valley

This area contains the least disturbed sections of this portion of the Niagara Escarpment. The area consists of a rich and diverse escarpment slope complex and an area of diverse forest on rolling, morainal deposits. Interesting riverine habitats are also found in this valley. This area has been designated as a Candidate Nature Reserve.

Minesing Swamp

The Minesing Swamp is a very significant waterfowl and wildlife area. A major wildlife complex extending from this wetland area, northeast to the Copeland Forest and including Little Lake supports a variety of wildlife including waterfowl, game birds, upland game species and a number of heronries. Deer yards are located in the Copeland Forest and east of the Minesing Swamp.

Tiny Marsh and Wye Marsh

Tiny Marsh and Wye Marsh are two other excellent waterfowl production and staging areas, which also support ruffed grouse, American woodcock, and some furbearers. In both locations, muskrat are abundant, in addition to a variety of other mammals, reptiles and amphibians. Giant Canada geese were introduced to the Wye Marsh and are now naturally reproducing in a protected area.

Northern Half of Matchedash Township

The northern half of Matchedash Township is an extensive tract of unregulated Crown Land. Wildlife species found here are typical of the shield area and include bears, deer, smaller mammals and bird game species. A few rare reptiles have also been identified here. The myriad of small lakes and beaver ponds produce thousands of waterfowl annually. Matchedash Bay is an extremely important waterfowl staging and production area.

Black River - Head River - North Lake Couchiching

The Black River - Head River - North Lake Couchiching area in Rama Township has a wildlife complex supporting upland game birds and some deer as well as waterfowl staging on the lake. The southern portion of Lake Couchiching, known as The Narrows, is also important for waterfowl staging and production.

Northeast Mara Township

The northeast portion of Mara Township supports a variety of upland game species. The lowland area surrounding Lake Dalrymple is also the site of waterfowl staging and production. A heronry can be found here, and an osprey nest has been reported in Lagoon City.

2.4.2 Significant Natural Areas and Wildlife Complexes - Crown Land

The publicly owned lands included in this category are managed or have simply been set aside by the Ministry of Natural Resources and/or local Conservation Authorities for their significance as high quality natural areas. Most of these areas are open for extensive forms of public recreation.

Within the Collingwood-Midland-Orillia Tourism Zone, there are 21 of these areas which are further classified as Nature Reserve or Natural Environment Provincial Parks; Provincial Park Reserves recommended for designation as Nature Reserve Provincial Parks; a Nature Reserve within an existing Natural Environment Provincial Park; and, Ministry of Natural Resources and Conservation Authority Management Areas.

a) Nature Reserve or Natural Environment Provincial Parks

Waubaushene Beaches

Several sets of raised beaches formed by glacial Lake Algonquin account for the geomorphic significance of this Nature Reserve.

Awenda

The site of this Natural Environment Provincial Park was acquired in 1963 because of the outstanding recreational potential afforded by its landscape features. Development priorities were revised to emphasize resource preservation and provide for low density recreation when provincially significant archaeological, geomorphological and vegetational features were discovered. One section of Awenda Provincial Park is indicated on Drawing 4 as having Nature Reserve potential due to the presence there of interesting geomorphological and vegetational features.

b) Provincial Park Reserves

A Provincial Park Reserve is any patent land acquired or Crown Land reserved under the Public Lands Act and/or the Mining Act by the Ministry of Natural Resources for future park purposes. The Park Reserves described here have potential as Nature Reserve Provincial Parks. 15)

Bass Lake

This Park Reserve located on the wetlands at the western edge of Bass Lake, has potential as a Nature Reserve Park due to its significant wetland vegetation and its potential for waterfowl management and hunting.

Giants Tomb Island

A set of raised beaches from glacial Lake Algonquin, and interesting and varied vegetation account for the area's potential as a Nature Reserve Park.

Wasaga Backlands

This Park Reserve has been recommended as a Nature Reserve because of the presence of parabolic sand dunes and associated vegetative communities.

McRea Lake

This potential Nature Reserve Park contains interesting geomorphic and vegetative features. It typifies Canadian Shield topography with areas of exposed rock broken by low, wet areas and associated vegetation.

Nottawasaga Lookout

This area has been determined by the Ministry of Natural Resources to have certain interesting earth and life science features, and has, therefore, been designated as a Candidate Nature Reserve.

Pretty River Valley

Interesting cliff and cave formations and associated vegetation lend earth and life science significance to this Candidate Nature Reserve.

Matchedash

The Canadian Shield topography, associated vegetation, and outstanding value as a waterfowl production and staging area make this area suitable for development as a Nature Reserve Park.

c) Ministry of Natural Resources Management Areas

The Ministry of Natural Resources manages the significant natural resources within these areas which accommodate extensive recreation opportunities.

Kolapore Uplands Recreation Area

Current holdings by MNR, Grey County and the North Grey Region Conservation Authority form the nucleus of a planned 4856 hectare recreation area. The area is described by the Parks Planning Branch as containing representative escarpment associations of a complex of rocky upland hardwood forests and mixed swamp forests.

Located within the northwest corner of the Kolapore area are the Duncan Crevice Caves. These interesting natural caves provide a good example of escarpment crevice caves and associated vegetation, and rim and talus slope forest associations. The caves and their immediate surroundings have been designated as a Candidate Nature Reserve.

Tiny Marsh

This marsh is an MNR Wildlife Management Area. This predominantly wetland area provides excellent habitat for waterfowl production and staging. Ducks, ruffed grouse, woodcock, pheasant and other waterfowl and upland game species are abundant.

Wye Marsh

Approximately half of this 920 hectare Wildlife Management Area is wetland. The other half consists of upland and lowland swamp. Wye Marsh is a very important waterfowl production and staging area and boasts a growing Canada goose population. The Canadian Wildlife Service operates an interpretation centre here.

Matchedash Bay

This area is classified as a Wildlife Management Area by MNR. Located about two kilometres north of Coldwater, this 225 ha wetland area is extremely valuable for waterfowl production and staging, furbearer production and angling.

Minesing Swamp

The influence of this swamp on the hydrology of the surrounding region is very pronounced. Any development schemes for the swamp must be considered with this fact in mind. This wetland supports an extremely diverse and sensitive flora and fauna, with over 39 plant communities identified to date.

MNR currently owns 607 hectares, and 1619 hectares have been acquired by the Nottawasaga Valley Conservation Authority. Land acquisition is still underway, so that the Resource Management Area boundaries have not been fully defined.

Copeland Forest

This 1619 hectare (4,000 acres) forest and wetland area is the headwater area for three major rivers. It is managed by MNR primarily for this hydrological function.

Upper Beaver Valley

This is an extremely well-preserved area with vegetation representative of a re-entrant valley and associated till moraine slopes, a bedrock gorge, and stream bottomlands.

Beaver Valley Lowlands

The relatively undeveloped state of the river valley from Kimberley to Heathcote, provides good nesting habitat for puddle ducks and hooded mergansers, and has excellent self-buffering potential. This area is also classified as a Candidate Nature Reserve.

d) Conservation Authority Management Areas

These properties are owned by local Conservation Authorities and are managed to preserve their important biophysical features.

Osprey Wetlands

The Nottawasaga Valley and Saugeen Valley Conservation Authorities have extensive land holdings in this wetland area.

The prime management objective is to protect the important hydrological function of this wetland which is the headwater area for the Saugeen, Beaver, Mad and Grand River systems. Extensive land acquisition and reforestation programs have been underway here since 1952.

Beaverdale Bog

The Beaverdale Bog is an area of approximately 121 hectares owned by the Saugeen Valley Conservation Authority. The bog itself is an outstanding example of a post-glacial lake in an advanced state of eutrophication. The lake is being filled in with wetland forms of vegetation, such as floating muskeg and black spruce trees, which are normally found in Northern Ontario. Due to the uncommon ecology of the area, it is proposed that the area be used for outdoor education.

Wodehouse

This management area contains a marsh and bog complex, a section of the Niagara Escarpment and a sinkhole complex within its boundaries. Its earth science features are of provincial significance. It is managed by the North Grey Conservation Authority.

Peasmarsh

A fish sanctuary within this management area provides excellent viewing opportunities during trout runs.

2.4.3 Avian Habitats

Important habitats are shown on Drawing 4. Included in this classification are important wetland areas where several pairs of waterfowl breed annually. Waterfowl areas are further subdivided into waterfowl production and waterfowl staging areas. Production areas generally support puddle ducks: mallard, black, bluewinged teal and wood ducks. Staging areas provide migratory "stopovers" predominantly for diving ducks such as lesser and greater scaup, goldeneyes, bufflehead and ringnecks.

In addition to waterfowl production and staging areas, avian habitats include the locations of sizeable tern and gull colonies, and (regionally) uncommon avian species such as osprey and herons.

2.4.4 Fisheries

The western portion of the study area, which falls within the Niagara Escarpment Planning Area, is the location of some of the best remaining coldwater fisheries in southern Ontario. The major streams and rivers in the area originate in the Niagara Escarpment uplands. Most are generally clear, cool and fast flowing. Brook trout are common in all major tributaries while young rainbow trout are found in most of the cooler streams.

The Bighead River, near the northwestern boundary of the area under investigation, hosts major migratory runs of rainbow trout from Georgian Bay and is a very significant contributor to the rainbow trout fishery of Georgian Bay. Smaller numbers of splake and Pacific salmon have also been reported in the lower reaches.

The headwaters of the Beaver River and its tributaries support good native brook trout populations. A dam at Thornbury prohibits the passage of rainbow trout upstream, although Ministry of Natural Resources plans for a fishway at this location should overcome this obstacle.

Eugenia Lake is presently dominated by small rock bass, although its cold water has potential for supporting trout species. The Ministry of Natural Resources is currently trying to rehabilitate the lake and re-introduce trout.

The Indian Brook, which enters Georgian Bay south of Thornbury, is also the site of heavy spring runs of anadromous rainbow trout.

The Pretty and Batteaux Rivers attract rainbow trout from Georgian Bay, although the latter is accessible only to four kilometres from the mouth. The Pretty River's clear, cold waters and gravel substrates provide an excellent spawning and nursery habitat for salmonids, and it is a major contributor to the trout fishery of Georgian Bay. The entire river system is a sanctuary from March 1st to the last Saturday in April.

The Nottawasaga River system is another major migratory route for rainbow trout from Georgian Bay. These fish have access to approximately 70% of the watercourse length. Walleye and pike also migrate up the stream to spawn. A major obstacle on many of the smaller streams is the presence of a large number of small dams for private impoundments. Rainbow trout are blocked by dams from entering the Noisy River at Dunedin. The western

portion of the Nottawasaga watershed is reputed to be one of the finest trout areas left in southwestern Ontario due to the clear, cool, gravel-bottomed streams present here. 9)

The Nottawasaga River and its tributaries, and other coldwater streams in the Niagara Escarpment area, are all extremely sensitive to poor water management practices. With such a high water quality, even small inflows of urban stormwater runoff could have drastic and far-reaching effects. Spawning areas are especially susceptible to such disturbances as dredging and filling. The Ministry of Natural Resources and local conservation authorities are well aware of these problems, and are actively undertaking extensive management programs to preserve this valuable resource.

Lake Simcoe and Georgian Bay are far less sensitive, in that much greater volumes of pollutants would be required to produce the same magnitude of effect. However, if development around Lake Simcoe continues at present rates, water quality will deteriorate badly within a relatively short time span. Major sources of pollutants are urban stormwater runoff, sewage, and air pollution fallout from the developed areas to the south.

Although the Lake Simcoe coldwater fisheries have been declining, the lake is still one of the most important coldwater fisheries in the district, and trout are harvested throughout the open season. The northern part of the lake is also a popular source of warmwater species such as yellow pickerel, yellow perch, and small-mouth bass. Other species include lake whitefish, herring and American smelt. The Narrows, between Lakes Simcoe and Couchiching is a popular spot in the spring when the yellow perch run. Small and largemouth bass and musky are also found in Lake Couchiching. 13)

Matchedash Sound and Matchedash Bay are considered to be the most important spawning and nursery areas for Georgian Bay in the Huronia District. Large and small yellow pickerel, yellow perch and smallmouth bass are a few of the common species here.

18)

Fish common to the outer Penetang Harbour include smallmouth bass, largemouth bass, pike, crappie, and splake. 13)

The Ministry of Natural Resources is actively involved in projects which will extend present fisheries. Many private individuals are being advised on construction and management of fish ponds. Private hatcheries are located at Waubaushene and Midhurst.

Splake (brook and lake trout hydrid) are being stocked into Georgian Bay at Christian Island and Cedar Point to attempt to establish a coldwater species which will be better suited than lake trout to changing environmental conditions. It is hoped that they will eventually become naturally reproducing.

2.4.5 International Biological Program (IBP) Sites

In the early 1970's, the Conservation Terrestrial Section of the International Biological Program examined and undertook inventories of important natural areas in participating countries, of which Canada was one. The candidate sites examined and documented in the Collingwood-Midland-Orillia study area are located on Drawing 4 and described in the following section. Sites marked with an asterisk (*) are those which have been considered worthy of preservation or management by the Ontario Government and have, therefore, been acquired.

Map Reference

Description

1. Turner Lake Swamp

The forest complex found here is one of the largest in the district, and is highly typical of lowland forests in this area.

2. Dunedin

This area contains a great diversity of fern species such as walking fern (Comptosorus rhizophyllus).

3. Henderson Property (Devil's Glen Provincial Park*)

A rich variety of fern species are found here, including some which are locally uncommon. The area is a good example of a limestone valley complex.

4. Duntroon Escarpment Forest

This is a representative scarp face, talus and rim complex with a high diversity of ferns including some locally uncommon species.

5. Osler Bluffs

A splendid scenic vista to the east is offered from this site, which is a moderately disturbed example of escarpment slope forest.

6. Craigleith Cranberry Lake

A very rich avian habitat and shoreline fen with associated plant species are found here. This area's affinities appear to be close to those of the Bruce Peninsula.

7. Brocks Beach

This site is especially notable for its extremely calcareous soil, and associated high calcareous soil forest associations.

8. Nottawasaga Sand Hills*

This is the largest, least disturbed and richest example of sand hill forest of oak and pine in the Nottawasaga area. It also contains a small but exceptionally rich and well-developed area of sandland lichen carpets.

9. Oakview Beach Ridges*

This area is one of the last backshore low ridge sandlands in the Nottawasaga Bay region that is still in a relatively natural regenerative state.

Sunnidale Hills and Bracken - Grassland*

This is the site of the largest grass - lichen prairie with western affinities in the Nottawasaga shoreline sandlands. The sand hills are also quite extensive here and are the highest and most varied in the locality.

11. Minesing Swamp and Bog Fen Complex*

This is a site of provincially significant plant associations, with an exceptionally large number of orchid species and the rarely-encountered associations of Torrentypnum nitens and Sphagnum warnsdorfii. It is the largest and best example of a bog fen complex in southern Ontario and shows signs of nutrient flow patterns normally associated with spring bogs.

12. Bass Lake Nature Reserve*

The Bass Lake area contains moderately disturbed, moist, swampy associations and a variety of orchid species.

13. Georgina Beach

This area contains various successional phases of the sandland forests typical of the district. Several plant species of physiographic interest are present, as is an extremely well-developed group of parabolic dunes similar to those of Wasaga.

14. Ossassane Beach

This area contains the best example of coniferous peatland swamp in the Nottawasaga Bay shoreline physiographic unit. It is also the site of one of the least disturbed sand dune forest complexes in the district.

15. Wye Marsh*

The Wye Marsh area is representative of the basin pond complexes common to the district. A compilation of species lists and bird nesting and population records for this area has been on-going since 1968.

16. Methodist Point* (Site of Awenda Provincial Park)

An abundance of bird species are found here, including blackbirds, grackles, orioles, and red-breasted grosbeaks. A provincially significant archaeological site is located here.

2.4.6 Environmentally Sensitive Areas (ESA's)

The criteria used for the designation of areas as "environmentally sensitive" are widely varying, depending upon such factors as size and type of area, and the mandate of the organization conducting the study. In general, however, the type of criteria employed includes areas of high species diversity, areas providing exceptionally good wildlife habitat, areas containing rare and/or endangered species, deer yards, areas susceptible to erosion, stream headwaters and highly productive wetlands, to name a few.

Environmentally sensitive and/or significant areas are shown on Drawing 4, marked with a black triangle and a number which corresponds to the following text descriptions. Information on these areas was obtained through discussions with personnel from the Ministry of Natural Resources and Conservation Authorities, 6,17) from MNR reports, 7,8,9,11,18) the Simcoe-Georgian Task Force report, 18) and Niagara Escarpment Commission maps. 11)

Map Reference

Description

1. Rocklyn Creek Valley

This natural area consists of an escarpment and creek valley. The escarpment has low cliffs on which grow walking fern and hart's tongue fern. The valley contains a mosaic of open maple, cedar, elm, and hemlock forest.

2. Delphi Point

This small area contains significant shoreline vegetation patterns and exposed fossiliferous shingle beaches. It is a "relic" natural area harbouring significant plant species on a very developed stretch of shoreline.

3. Blue Mountain Clay Slope

This area is a clay slope with second growth aspenbirch forest dominating. Some open aspen, red oak parkland, and intermediate-aged sugar maple forest are also present.

4. Banks Moraine Forest

This natural area consists of a mosaic of upland and swamp forests on moraine deposits with a good overall species diversity.

5. Gibraltar Moraine Forest

This area is very similar to and just south of the Bank's Moraine Forest. It has a rich deciduous forest.

6. Rob Roy Escarpment Forest

Adjacent to the Pretty River Valley Candidate Nature Reserve is a forested section of escarpment. The young to intermediate-aged sugar maple forest has a moderately diverse ground cover which includes such species as hart's tongue fern and Goldies fern. Sections of the upland forest are being managed for timber production by the Ministry of Natural Resources.

7. Bowles Gully

This is a small area with representative re-entrant valley slope forests. There is a rock outcrop zone at the rim, and seepage areas on the slopes.

8. <u>Mitchell Creek Valleys</u>

This site includes valley slope forests along the two branches of Mitchell Creek and respresentative escarpment associations along the western slope. There is a waterfall along the east branch.

9. McIntyre Swamp

This natural area contains areas of upland deciduous forest as well as deciduous, mixed and coniferous swamp forest areas. A number of interesting plant and animal species and a great variety of ferns are also present.

10. Singhampton South Swamp

This rich cedar swamp contains a number of significant vegetation species.

11. Glen Huron Southwest Swamp and Escarpment

This area contains a section of escarpment face with fissure caves, talus slopes and rich swamp forests along the valley. A rich cedar swamp in a depression back from the escarpment rim contains a number of significant species. The area is generally well-preserved.

12. Glen Huron Gorge

The lower portion of the deeply cut Devil's Glen Gorge has moist deciduous woods on the clay-rubble banks. MNR (1976) has recommended that the area be considered in conjunction with the Devil's Glen Huron swamp and escarpment.

13. Marl Lake

This is a very shallow lake, in the process of succession to a bog. It is surrounded by wetlands and is undeveloped, with potential for educational nature interpretation.

14. Northeast Essa Township

This is a heavily forested area of about 7,000 acres with a variety of vegetative species which provide food for ruffed grouse, hare and deer. This area contains the headwaters of the Bear Creek, a valuable rainbow trout stream. It is also a breeding area for woodcock which are harvested here in considerable numbers.

15. <u>Innisfil Swamp</u>

This 2,000 acre swamp area provides good deer habitat and also hosts grouse, woodcock and hare.

16. Kempenfelt Bay Estates

The southern shore of Kempenfelt Bay is the location of a number of older summer estates. A dense growth of 150 to 175 year old maples, oaks, and other hardwoods as well as some pine has been preserved by the estate owners.

2.5 Recreational Use of Wildlife and Fishery Resources

2.5.1 Hunting

Statistics on small game hunting in the study area were obtained from the Fish and Wildlife Branch of the Ontario Ministry of Natural Resources and from its Huronia and Owen Sound District Offices. 12) These statistics are based on a mail survey conducted in 1976. The results of the survey indicate a projected total of 243,000 active Ontario resident small-game hunters, who each averaged 14 hunter-days in the year of the survey.

Hunters hunting in Simcoe County accounted for 3.4% of the Ontario total, or roughly 12,000 hunters, who spent a total of 116,400 hunter-days in the county - an average of 9.7 days per hunter.

Grey County was found to support 3.3% of all hunting activity in Ontario. 8,000 active hunters hunted in this county in 1976 accounting for 88,000 hunter-days - an average of 11.0 days per hunter.

Statistics for the District Municipality of Muskoka, which takes in only a small portion of the study area, are not very applicable to this undertaking, but are included here for comparative purposes. An estimated 3,200 people hunt in this district roughly 1.3% of the provincial total. These relatively low figures reflect the area's small population and its greater distance from potential markets in the Toronto-Hamilton-Oshawa area.

Table 7 provides a general indication of the origin of people hunting in the study area in 1976.

TABLE 7

ORIGIN OF SMALL GAME HUNTERS HUNTING IN THE COLLINGWOOD-MIDLAND-ORILLIA STUDY AREA

BY COUNTY OR REGION 12)

ORIGIN	PROJEC	CTED NUMBER	OF HUNTERS					
	Destination							
	Grey County	Simcoe County	Muskoka (D.M.					
Bruce County	700	0	50					
Dufferin County	560	146	0					
Durham County	20	293	200					
Hamilton-Wentworth Regional Municipality	240	150	70					
Halton Region	120	200	70					
Hastings County	0	20	50					
Huron County	120	20	0					
Kent County	20	0	50					
Lambton County	50	70	0					
Middlesex County	200	70	70					
Niagara Regional Municipality	120	120	100					
Parry Sound District Municipality	. 0	0	200					
Peel County	340	660	270					
Perth County	50	0	50					
Prince Edward County	20	0	0					
Metropolitan Toronto Regional Municipality	1,200	4,000	1,540					
Waterloo Regional Municipality	600	20	50					
Wellington County	260	50	70					
York Regional Municipality	100	560	240					

Non-residents, e.g., people from outside Ontario, exhibit a preference for northern Ontario over southern Ontario for their hunting activities. Out of a total of 8,527 non-residents hunting in Ontario in 1976, only 16 (0.2%) hunted in Grey County and 27 (0.3%) in Simcoe County.

As indicated by Table 7, the majority of hunters coming to Grey County from other parts of the province come from Bruce, Dufferin, and Wellington Counties, and the Regional Municipalities of Metropolitan Toronto and Waterloo. It must be stressed here, however, that the study area covers only a portion of Grey County so that figures presented in Table 7 are not necessarily representative of the study area.

Data presented for Simcoe County in the same table give a more meaningful indication of the actual origins of visitors to the study area which encompasses most of this county. The highest contributor of hunters to Simcoe County according to Table 7, is the Toronto area, which accounts for an estimated 4,000 hunters. The Regional Municipalities of Peel and York are also significant, accounting for 660 and 560 hunters respectively, followed by Durham, Halton, Hamilton-Wentworth, Dufferin and Niagara.

A large number of hunters from Toronto travel to the Muskoka area (1,540). Peel and York are also the origin of a significant number of these hunters, as is Parry Sound. In general, however, it is obvious that the hunting opportunities in the Collingwood-Midland-Orillia area attract hunters mainly from within a radius of about 200 km.

Table 8 provides estimates of actual numbers of hunter-days spent hunting for specific small game species, and gives a rough indication of numbers of animals harvested. Statistics for counties

TABLE 8

SMALL GAME STATISTICS BY COUNTY OR REGION FOR 1976 12)

ANIMALS	COUNTY/REGION	ESTIMATED HUNTERS	ESTIMATED HUNTER-DAYS	ESTIMATED HARVEST
DUCKS	Grey	3,100	16,000	13,100
	Simcoe	6,900	40,700	53,400
	Muskoka	1,600	12,600	8,100
	Dufferin	2,600	12,600	13,800
	York	1,100	7,200	6,300
GEESE	Grey	800	4,200	500
	Simcoe	1,000	6,000	500
	Muskoka	20	50	300
	Dufferin	600	2,200	400
	York	300	2,200	200
PHEASANTS	Grey	500	2,700	6,000
	Simcoe	1,400	6,500	3,900
	Muskoka	100	300	900
	Dufferin	300	1,400	1,800
	York	1,100	4,200	3,800
RUFFED GROUSE	Grey Simcoe Muskoka Dufferin York	4,000 5,100 2,800 1,500 900	24,700 32,800 26,000 8,300 5,000	19,800 20,700 20,000 6,900 3,300
WOODCOCK	Grey	600	2,600	1,400
	Simcoe	1,400	9,600	12,400
	Muskoka	200	2,000	900
	Dufferin	400	2,900	2,700
	York	250	1,900	1,800
COTTONTAIL	Grey	2,000	13,000	8,100
	Simcoe	3,400	22,000	13,500
	Muskoka	600	5,100	3,000
	Dufferin	. 1,550	9,400	7,850
	York	950	4,400	2,600
EUROPEAN HARE	Grey Simcoe Muskoka Dufferin York	2,500 2,800 900 1,700 1,000	16,700 19,900 600 9,600 5,800	5,400 8,200 700 5,100 3,300
RACCOON	Grey	900	8,000	9,100
	Simcoe	600	4,800	8,800
	Muskoka	100	300	200
	Dufferin	200	1,500	1,100
	York	300	1,700	1,100
OTHER	Grey	2,100	18,600	10,700
	Simcoe	1,600	16,600	10,900
	Muskoka	350	2,200	1,500
	Dufferin	550	5,700	4,600
	York	400	3,800	1,600

outside the study area have been included in this table for purposes of comparison only. Simcoe County provides the greatest harvest for almost all species listed except pheasant and raccoon which are more commonly harvested in Grey County. These figures reflect the existence of a greater number of wetland areas and shoreline habitats in Simcoe which support waterfowl production, and the predominantly upland nature of Grey which supports upland species. As further proof of this fact, more ducks are harvested in Simcoe than in Grey, Muskoka, Dufferin and York combined.

The great numbers of cottontail and European hare harvested in Simcoe County is indicative of the extensive areas of farmland in this county. The Mud Lake, Tiny Marsh, Wye Marsh, and Copeland Management areas of Simcoe County further augment the attractiveness of this county for small game hunting. In 1976 - 1977, an estimated 5,600 hunter-days were spent in the Tiny Marsh, 2,400 in the Wye Marsh, and 200 at Mud Lake.

Deer hunting is very well-regulated in Simcoe County by the Huronia District Office of the Ontario Ministry of Natural Resources. ⁵⁾ In 1979, gun hunting was permitted during only three days in November. Within the study area, a total of 1,200 hunters spent 3,125 man-days and harvested a total of approximately 170 deer, most of which were shot in Vespra Township and on the Tiny-Tay Peninsula. The Huronia District Office estimates that 75% of these hunters were residents of Simcoe County. 25% of those who participated in hunting in Simcoe County were not resident in the County. Of these, most were from Toronto, although some came from as far away as Kincardine.

The bow hunting season in Simcoe is considerably longer than the gun hunting season, extending over eight weeks between October and mid-December. 14) In 1978, a total of 1,157 days were spent by 68 archers resulting in a total harvest of 25 deer within the

study area. 14 of the 25 were harvested in Vespra Township, while the remainder were distributed quite evenly over the other townships. Trends indicate that bow hunting for deer is increasing in popularity in the Huronia District.

In 1979, a "primitive weapons hunt" was staged in the Copeland Forest, and drew an estimated 260 hunters over a two week period. A total of 10 deer were harvested.

The Owen Sound District of the Ministry of Natural Resources estimates that a total of 3,000 deer hunters accounted for a total of 10,100 hunter-days and a harvest of 660 deer in 1978. 17)

Although hunting is not a major attraction in the Collingwood-Midland-Orrillia Tourism Zone, it does generate some revenue for the area. It is estimated that Simcoe County residents spend approximately \$1.5 million on this sport annually, while Grey and Muskoka residents spend slightly in excess of \$1 million and \$600,000 respectively.

2.5.2 Angling

The most recent statistics available on recreational fishing in the province are from Ontario Angling, a report published in 1974 by the Sport Fisheries Branch of the Ministry of Natural Resources. According to this publication, which is based on the results of a mail survey conducted in 1970, a projected total of 2,426,000 people fished in Ontario during that year accounting for a total of 53 million angler-days -- an average of 22 days per person. Approximately 1,620,000 anglers were residents of Ontario and the remaining 806,000 or roughly one-third of the total, came from out of the province.

The Ministry of Natural Resources Central Region, of which the study area form a part, supported roughly 25% of the total resident angling in Ontario, and about 10% of the non-resident angling. Approximately 405,000 residents and 80,600 non-residents angled in the Central Region. Approximately 80% of the study area falls within the Central Region's Huronia District. This district supported 7% of Ontario's angling activity. Roughly 170,000 anglers spend 3,700,000 angler-days here.

6% of all angling activity in the Central Region was attributable to non-residents. This figure is considerably lower than the average (33%) for the province. Of this 6%, 3% is accounted for by residents of Ohio, and 3% by residents of other provinces and states.

Residents of York and Simcoe Counties accounted for 49% of the resident anglers in the Central Region. Niagara residents accounted for another 8% and the remaining 31% was accounted for by residents of various other areas within the Central Region.

The species most often caught (in decreasing order) by resident anglers of Simcoe County were, northern pike, yellow pickerel, brook trout, lake trout, bass, rainbow trout, smallmouth bass, whitefish, yellow perch, largemouth bass, smelt, brown trout, panfish, splake, maskinonge and others. Approximately 24% of total angler-days accounted for by Simcoe residents were spent ice-fishing.

The fish caught in Grey County are predominantly cold water species, whereas those caught in Simcoe County tend to be more characteristic of warm water. Rainbow trout, brown trout and brook trout are the most frequently caught species, followed by yellow pickerel, yellow perch, lake trout, smallmouth bass, splake, bass, northern pike, coho salmon, whitefish, smelt, panfish, maskinonge and others. Only 5% of angling accounted for by Grey County residents was spent ice-fishing.

The northernmost portion of the study area, part of Georgian Bay Township, is part of the Parry Sound MNR District. Yellow pickerel are caught most often here, followed by brook trout, whitefish, lake trout, rainbow trout, northern pike, largemouth and smallmouth bass, smelt, maskinonge, splake and small numbers of a few other species. The warm water species are most often caught in inland rivers and lakes, while the cold water species are caught mainly in the deeper waters of Georgian Bay. Almost 28% of the total angler-days accounted for by Georgian Bay Township residents were spent ice-fishing.

In summary, it is evident from the statistics presented here that angling provides a significant input to tourism in the Collingwood-Midland-Orillia Tourism Zone. Non-resident anglers are estimated to have spent some \$10,402,000 in the Central Region in 1970, of which a considerable portion was likely spent in Huronia. In 1970, a total of approximately \$31,519,800 was spent in Ontario on angling activities, or \$124 per resident angler and \$142 per non-resident angler.

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2.0 NATURAL RESOURCES

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2.4 Environmentally Sensitive/Significant Areas, and

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3.0 TOURISM FACILITIES AND SERVICES INFRASTRUCTURE

The existing infrastructure of tourism facilities and services is made up of developed recreational lands and facilities, tourist accommodation, dining facilities, service centres, and resorts which may contain any or all of these facilities. It also includes the existing transportation system within and giving access to the study area. Diversified and high quality services and facilities are essential to the maintenance or improvement of the tourism industry within the study area.

3.1 Public Recreation Lands and Facilities

Recreational lands are discussed here under two major headings: Crown Lands and Linear Recreation Resources.

3.1.1 Crown Recreation Lands

The Crown owned public recreation lands fall under the three administrative categories: federal, provincial and regional. Within the study area, federally administered lands include one National Park and numerous federally owned (Parks Canada) public lands along the Trent-Severn Waterway. The provincially administered lands include all lands directly administered by the Ministry of Natural Resources. Regionally administered lands include all Conservation Authority properties and county forests. The various designations falling under these categories are discussed in the following text. Recreation facilities within these public areas are graphically presented in Drawing 5 and listed in Figure 2.

The Niagara Escarpment Commission has proposed a Niagara Escarpment Parks System in order to preserve the unique and sensitive escarpment environment, and to provide for recreational experiences along the escarpment. The proposed parks are

DRAWING NO. 5

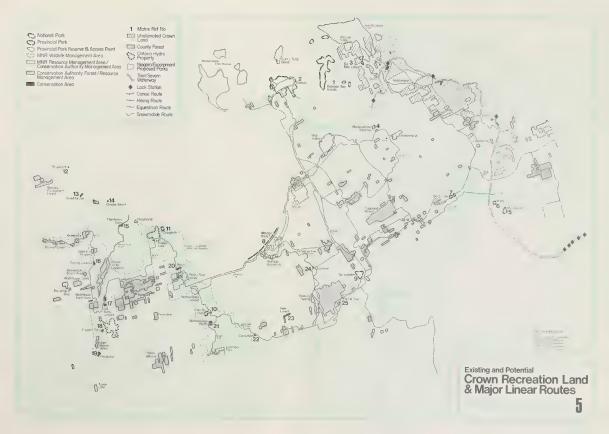




FIGURE 2

CROWN LAND FACILITIES



Structured Crown Land Facilities OVERNIGHT FACILITIES DAY USE Winter Use Type Parks Size NATIONAL PARK Х х 186 Georgian Bay Islands 1,380 National Park PROVINCIAL PARKS 150 *C.S. 4 Awenda 1,993 Under Development Natural Environment 92 *S, T, Ss Bass Lake 69 Recreation х Х Х Х Х X X Park 170 Recreation 11 Park 40 55 Recreation 10 Devil's Glen Park *C.S. 40 Recreation 6 Mara X Park 69 Recreation 5 McRae Point Х х Park 192 72 Recreation Six Mile Lake X Х Х Park *C.S. 48 Springwater Day Use Only Х Х Day Use Only 141 8 Wasaga Beach Х Х Χ 34 Nature Reserve Waubaushene Beaches 155 Included for 152 31 Recreation Oastler Lake comparison Х Χ X Park purposes

XX

Х

Х

X

*S: Skiing

Killbear

T: Toboganning

Ss: Snowshoeing

Sn: Snowmobiling

C.S.: Cross-country skiing

1,756

Natural Envi-

ronment Park

x X

920 Included for

comparison



Structured Crown Land Facilities

Stiu	Structured Crown Land racindes															
Map	Conservation Areas	Size (ha)	Authority	gate E.	(ac; 1); (ac;	Pice (ars)	Camposi	Spound Les	Orinki	2 Just 7 2	Swift	ρή (m. 808)	Motor Ching	Strictorts Fish:	Hunt;	Walking Trails (km)
13	Beautiful Joe	18.6	North Grey		25	х			×	×	×			x		0.4
14	Christie Beach	0.9	North Grey		20	x					×	×		х		
15	Clendenan Dam	62.3	North Grey		20	×								×		1.61
16	Epping Lookout	4.8	North Grey		15	×										0.8
17	Old Baldy Lookout	78.9	North Grey		5											0.4
18	Eugenia Falls	23.0	North Grey			x								×		
21	Nottawasaga Bluffs	37.2	Nottawasaga Valley			Х			×				×			0.6
22	Carruthers	19.8	Nottawasaga Valley	×	50	×	25	ı	×				х	×		0.2
23	New Lowell	59.1	Nottawasaga Valley	х	129	x	60	ı	х		×	×	х	×		0.6
24	Edenvale	5.7	Nottawasaga Valley	×	50	×	25	1	×			×		×		
25	Fort Willow	3.6	Nottawasaga Valley		HIST	DRIC	SITE									
20	Petun	40.0	Nottawasaga Valley			×							x			0.2
19	Flesherton	33.0	North Grey			×							x			
12	St. Vincent		North Grey		BEIN	G D	EVELOP	ED								
			•	-				_								O combin

Figure 2 cont'd



predominantly composed of lands currently under Crown ownership. A short description of each proposed park within the study area is included in this section.

a) Federal Lands

Federally administered public lands within the study area are limited to one National Park and the Trent-Severn Waterway along with the federally owned properties adjacent to the waterway. Several government docks are also shown on Drawing 5.

Georgian Bay Islands National Park

Georgian Bay Islands National Park consists of nearly 50 islands or portions of islands within an archipelago of more than 30,000 islands in Georgian Bay. The main area of the park, Beausoleil Island, as well as several smaller islands are located within the study area. Most of the smaller islands, including Flower Pot Island, fall outside of the study area.

The only access to Georgian Bay Islands National Park is by water. Structured recreation facilities are provided for activities which include camping, swimming and hiking. Visits to the park are limited to a maximum of two weeks, and the campsites are allocated on a first come first serve basis. Figure 2 lists recreation facilities within the park.

Trent-Severn Waterway

The Trent-Severn Waterway is a sector of the Rideau-Trent-Severn system, a 684 kilometre waterway extending from Ottawa to Georgian Bay. The Trent-Severn sector itself extends from Trenton on Lake Ontario to Port Severn on Georgian Bay, a distance of 386 km. Originally the Trent-Severn came under the administration of the federal Department of Transport as a commercial transportation route. In 1972 administration was transferred to the Department of Indian and Northern Affairs, Parks Canada, a move which acknowledged the fact that the waterway is a recreational and heritage resource as well as a commercial transportation route.

Within the study area there are eight locks, one marine railway and two artificial canals, located by Washago at the northern end of Lake Couchiching and on the Talbot River on the eastern side of Lake Simcoe. The rest of the waterway passes through improved lake and river passages.

The federal government owns lands beside the canal in places where construction has necessitated land acquisition or in areas where landowners have insisted that the government buy their land which has become flood prone due to the building of dams along the canal. Most of these lands are narrow strips less than 30 m wide. At present, the lock stations and their associated land holdings are being used for structured recreation purposes such as boating, picnicking and interpretation.

Plans have been made to improve the facilities at the Big Chute Marine Railway. Plans have been made to improve parking areas, increase the day use areas, provide observation points, increase docking and boater overnight camping capacities and also provide pathways through the Parks Canada properties, over the next several years. Interpretation facilities will also be improved to cover not only the railway's history but also the history of the local area. Big Chute is the only lock station on the Severn River for which Parks Canada is preparing a management plan. Holly Island, north of Port Severn, has recently been purchased by Parks Canada, and will be preserved as an open space and day use area for boaters on the Trent-Severn.

As a linear recreation resource, the Trent-Severn Waterway is jointly managed under the Canada-Ontario Rideau-Trent-Severn (CORTS) agreement. Under this agreement, the federal and provincial governments will co-ordinate development projects along the waterway. The objectives of the CORTS agreement are to provide adequate recreational facilities and commercial developments, and to help regulate private development along the waterway. Various government agencies including Parks Canada, the Ministry of Natural Resources, the Ministry of Culture and Recreation and the Ministry of the Environment are involved in the formulation and implementation of planning strategies which will meet these objectives.

b) Provincial Lands

The provincial lands have been divided into the following five classifications according to their designation and administration within the Ministry of Natural Resources: Provincial Parks, Provincial Park Reserves, Wildlife Management Areas, Resource Management Areas and unalienated Crown Land.

i) Provincial Parks

A system of parks has been developed in Ontario to meet the following objectives:

- to protect areas of natural and cultural value;
- to provide for a wide range of recreational opportunities;
- to encourage tourism within the province; and
- to stimulate greater appreciation of Ontario's heritage.

Further to these objectives, the parks have been given six classifications according to development priorities, namely: Recreation, Natural Environment, Wilderness, Waterway, Nature Reserves and Historical.

There are ten Provincial Parks within the study area. Eight of these are classified as Recreation parks, one is classified as a Natural Environment park and one is classified as a Nature Reserve park. Figure 2 lists the structured facilities and recreational opportunities of each park. Following are short descriptions of Provincial Parks located within the study area.

Awenda (Natural Environment)

The primary purpose of this Natural Environment park is to provide an educational experience based on the park's archaeological, geological and vegetation resources. Archaeological artifacts represent the remains of two prehistoric Indian occupations. Several raised shorelines from glacial Lakes Nipissing and Algonquin and diverse vegetation species are interesting interpretive features.

Awenda was first acquired because of its exceptional recreational qualities. However, development priorities were reversed when it's exceptional archaeological and geographical resources were discovered. The park now accommodates cross-country skiing, swimming, hiking and camping activities.

Bass Lake (Recreation)

This Recreation park provides for good fishing and water-based recreation as well as camping.

Craigleith (Recreation)

This small park located on Georgian Bay provides a rocky shoreline suitable for some water-based activities. This is an interesting area for historical and geological interpretation. Fossil shales are found along the shore and a plaque commemorates the Shale Oil Works which once operated in the vicinity. Campsites and camping facilities are also provided.

Devil's Glen (Recreation)

Located on the Niagara Escarpment beside the Bruce Trail, this small park provides excellent hiking and scenic viewing opportunities along with camping facilities.

Mara (Recreation)

Located on Lake Simcoe, Mara Park accommodates water-based recreation activities such as swimming and small boating. Campsites are available as well.

McRae Point (Recreation)

This Recreation park provides for water-based activities and acts as an access point to the Trent-Severn Waterway with its boat launching facilities. Hiking and camping are also popular in this park.

Six Mile Lake (Recreation)

Located on the Canadian Shield, this park provides excellent opportunities for hiking and water-based recreation. It acts as an access point to the Gibson McDonald canoe route. Campsites are also available.

Springwater (Recreation)

This day-use Recreation park provides excellent opportunities for hiking and cross-country skiing.

Wasaga Beach (Recreation)

Located on Georgian Bay, this day-use Recreation park with its extensive beach provides exceptional opportunities for water-based activities and picnicking.

Waubaushene Beaches (Natural Reserve)

The primary significance of this Nature Reserve park is its earth science features which include raised beaches deposited by glacial Lake Algonquin. Limited picnicking facilities are available.

ii) Provincial Park Reserves⁵⁾

Park Reserves are Crown Lands acquired by the Ministry of Natural Resources for future inclusion into the Provincial Parks System. Some of these areas require further acquisition prior to development as Provincial Parks.

Following are descriptions of Park Reserves found within the study area.

Bass Lake (existing size 185 ha; proposed size 259 ha)

This reserve, located on the western wetlands of Bass Lake, was purchased for its potential as a nature reserve. The area has potential for waterfowl management and hunting.

Dunn Access Point (36 ha; no further acquisition)

This small Park Reserve, which serves as an access point to the Severn section of the Trent-Severn Waterway is presently used as a picnicking and camping site. Facilities here include picnic tables and two docks. Plans for this area include the further development of camping, picnicking and docking facilities.

Giants Tomb (existing size 479 ha; proposed size 517 ha)

This Park Reserve, located on an island in Georgian Bay, is recommended for designation as a Natural Environment or Nature Reserve Provincial Park. Raised beaches of glacial origin as well as a diversity of vegetation species are highly interpretable features.

The area is presently used as a stop-off point by boaters who swim or picnic here. Privies and garbage collection services are provided for visitors. Proposed developments include boat-in camping and day-use facilities for docking, camping, picnicking and hiking.

Lavender Falls (existing size 200 ha; proposed size 386 ha)

This potential Natural Environment park is presently leased to farmers. It is traversed by the Bruce Trail which offers excellent opportunities for hiking. Three fish ponds on the property have limited potential for fishing and wading. Some potential also exists for camping and picnicking.

Matchedash (2511 ha; no further acquisition)

A large portion of this area has potential as a Nature Reserve park. The recreational potential of the area is minimal with the exception of possible fishing and hunting potential and an existing snowmobile trail. If development does occur it will be based on day-use recreation primarily of an interpretive nature.

McRae Lake (107 ha; no further acquisition)

At present, this area contains 13 campsites which are used by canoeists travelling the Gibson-McDonald Canoe Route as well as several day-use sites, and parking lots located on Highway 103. The reserve is also popular with anglers. Potential exists for the development of several more campsites as well as picnicking areas for canoeists and hikers. The hiking and fishing potential of the area are both very good. The proposed classification for this area is Natural Environment or Nature Reserve.

Nottawasaga Lookout (220 ha; no further acquisition)

This reserve has potential for car-oriented campsites, picnicking areas and trail-oriented campsites. Located on the escarpment, this property offers excellent hiking opportunities. Future classification will be either Nature Reserve based on certain interesting earth and life science features, or a Recreation park.

Wasaga Backlands (1195 ha; no further acquisition)

This potential Nature Reserve or Natural Environment Park has good potential for campsites and picnic areas. The parabolic dunes in this area are the primary interpretive features.

Couchiching (45 ha; no further acquisition)

This site is located at the entrance to the Trent-Severn Waterway, and is important only because of this location. Its potential for future development is limited to the provision of picnic areas.

Pretty River Valley (800 ha; no further acquisition)

This area lies within the Niagara Escarpment Commission area and, therefore, has not been examined in detail by the Ministry of Natural Resources. Present recreational use includes snowmobiling, cross-country skiing and hiking.

iii) Ministry of Natural Resources Wildlife Management Areas 7)

These public lands are managed by the Ministry of Natural Resources to preserve wildlife habitat and increase recreational opportunities. Three designated Wildlife Management Areas are located within the study area and are described as follows:

Wye Valley (971 ha)

This area of rolling, wooded uplands and marsh complexes offers excellent opportunities for nature viewing, hunting, hiking and fishing. Two waterfowl feeding sanctuaries are closed to hunters. A Canadian Wildlife Service Interpretation Centre is also located in the marsh area.

Tiny Marsh (approximately 900 ha)

This wetland marsh area affords excellent opportunities for wildlife viewing and hunting. Dikes within the marsh provide excellent walkways. One waterfowl feeding sanctuary is closed to hunters.

Matchedash Bay (225 ha)

This very rugged area contains several small lakes as well as numerous beaver ponds, marshes and swamps. The area has excellent potential for fishing and hunting activities.

iv) <u>Ministry of Natural Resources Resource Management</u> Areas

These public lands are generally administered by the Ministry of Natural Resources but may be jointly administered by the Ministry and Conservation Authorities. They are or will be managed for multiple resource use including extensive recreation.

Following are descriptions of the five Resource Management Areas found within the study area.

Kolapore Uplands (Ministry of Natural Resources-1980 ha; Conservation Authority-930 ha)

This area's natural attributes include a section of escarpment and an assortment of valleys, swamps, lakes and streams. The Duncan Crevice Caves have been designated as a Candidate Nature Reserve by the Ministry of Natural Resources. These caves are associated with a unique vegetative complex, and a rim and talus slope forest. The Bruce Trail and numerous other trails run through the area offering numerous scenic views as well a hiking, snowmobiling and cross-country skiing opportunities. Excellent hunting and fishing opportunities also exist. The area also has potential for camping. It has not yet been fully developed, but existing plans call for expansion of the managed area to include 4,856 ha.

Minesing Swamp (Ministry of Natural Resources-450 ha; Conservation Authority-1618 ha)

This area has very diverse biophysical management needs. The swamp is an important reservoir so that its hydrological systems are important not only on a local scale but also on a regional scale. Wildlife and vegetation resources are another management concern due to the presence of rare and diverse species of vegetation and the importance of the area in wildlife life cycles. Recreation opportunities and existing recreation activities are numerous. Hunting, trapping and fishing are popular in this area. The Nottawasaga canoe route passes through the swamp, and the area is also used for cross-country skiing, hiking and snowmobiling.

A study to formulate management strategies has been completed but not fully implemented.

Copeland Forest (MNR-approximately 1,600 ha)

This area was recently acquired by MNR for development of extensive recreation opportunities and resource management of the various swamp and woodland environments. Present recreation activities include snowmobiling and cross-country skiing.

Beaver Valley Lowlands (MNR-540 ha)

The lands within this area are administered by the Ministry of Natural Resources. Present recreational activities include hunting, fishing and canoeing on the Beaver River canoe

route. Management priorities concentrate on preservation of river-related fish and wildlife resources and timber resources. The camping and picnicking potential is low due to the sensitivity of this flood prone environment.

Upper Beaver Valley (MNR-80 ha)

These lands along the Upper Beaver River are owned by the Ministry of Natural Resources. The adjacent land is part of a proposed acquisition area which contains a variety of natural areas and geological sites including Hogg's Falls.

v) Unalienated Crown Lands

Unalienated Crown Lands are provincially owned areas which have not been previously sold, and are, therefore, in their original state. They are managed by the province for landscape preservation, forestry and, to some extent, for extensive recreation. The northern half of Matchedash Township is largely made up of unalienated Crown Land.

c) Regional Lands

Regional lands are discussed here under two major headings: County Forests and Conservation Authority Areas, including Conservation Areas and Conservation Authority Forests and Management Areas.

i) County Forests

These areas have been acquired by the Ministry of Natural Resources for landscape preservation, forestry, wildlife management and extensive recreation. As recreational areas, these properties are predominantly used for extensive activities such as snowmobiling and cross-country skiing. Several dozen county forests are found within the study area.

ii) Conservation Authority Areas

Originally created to deal with flooding and erosion problems, Conservation Authorities are now concerned with the provision of recreation opportunities as well as forestry and wildlife management. Conservation Areas are lands which have been acquired by the Authorities for the construction of dams and reservoirs, channel improvements and the management of valley lands which will help control water as well as provide opportunities for structured recreation activities such as picnicking, camping, hiking, fishing, swimming and nature interpretation. 14 Conservation Areas are situated within the study area.

Management priorities of Conservation Authority Forests and Management Areas concentrate more on conservation of water, forestry, fish and wildlife resources than they do on provision of recreation opportunities. However, in most cases, they are open to the public for unstructured extensive recreation activities such as snowmobiling, cross-country skiing and hiking. A number of these areas are situated in the western portion of the study area.

d) Niagara Escarpment Parks System

Through the cooperation of the Conservation Authorities and the Ministry of Natural Resources, a system of parks has been proposed for the Niagara Escarpment. It is intended that the parks system be cooperatively managed by the Ministry and the Conservation Authorities. Each of the parks has been classified according to the proposed degree of development and management.

Within the study area there are nine proposed Nature Reserve Parks, eleven proposed Natural Environment Recreation Parks, two proposed Intensive Recreation Parks and one undesignated proposed park.

i) Nature Reserve Parks

These proposed parks are generally made up of provincially significant natural areas, and, as such, are to remain in a natural state with limited development for extensive recreation activities such as hiking and nature viewing.

Bayview Escarpment Forest (450 ha)

These MNR lands are presently used for hunting and hiking. Part of the property extends outside the study area into Sydenham Township.

Beaver Valley Lowlands (540 ha)

The fish and wildlife resources of this area are managed for recreational hunting and angling. A canoe route generates additional recreation activity.

Kimberley Rocks (40 ha)

North Grey Region Conservation Authority owns this property which is presently known as Old Baldy Conservation Area. A proposed acquisition area surrounds this site which is now used primarily for hiking.

Wodehouse Sinkhole and Wodehouse Creek Karst Natural Areas (MNR - 300ha; Conservation Authority - 30 ha)

Included in this jointly owned property which is presently managed by Grey Region Conservation Authority, are several karst sinkholes and a disappearing creek which have considerable interpretation value.

Upper Beaver Valley (80 ha)

This MNR property contains several interesting geological features and a waterfall. A proposed acquisition area lies adjacent to this property.

Pretty River Valley South East Slopes (500 ha)

Presently part of Pretty River Valley Park Reserve, this MNR property includes such features as the Niagara Escarpment, Gibralter moraine and the Pretty River headwaters.

Nottawasaga Lookout (220 ha)

This area is presently a Provincial Park Reserve.

Nottawasaga Bluffs (37 ha)

This area is presently a Nottawasaga Valley Conservation Authority Conservation Area. It is used for camping, hiking and cross-country skiing.

Lavender Falls (200 ha)

This area is presently a Provincial Park Reserve. A proposed acquisition area with a waterfall, lies adjacent to this property.

ii) Natural Environment Recreation Parks

These proposed parks contain significant recreational, historical or natural features, and are recommended for development as recreation areas for extensive activities such as hiking and interpretation as well as some camping.

Rocklyn Creek (200 ha)

This property, owned by the North Grey Region Conservation Authority contains an interesting and interpretable geological site and a waterfall. Hiking is the most important recreational activity.

Griersville (170 ha)

The North Grey Region Conservation Authority owns this land which is used primarily for hiking.

Alderdice Property (22 ha)

This Crown property is predominantly used for hiking.

Epping Lookout (5 ha)

This designated Conservation Area is owned by the North Grey Region Conservation Authority. It is presently developed as a small roadside picnic area with a view into the Beaver Valley.

Beaver Forest Area (60 ha)

This property is owned by the North Grey Region Conservation Authority.

Wodehouse Creek Conservation Area (101 ha)

The North Grey Region Conservation Authority owns this land which is presently used for hiking and nature interpretation.

Eugenia Falls (23 ha)

Present existing recreation activities in this designated Conservation Area include hiking, picnicking, cross-country skiing and scenic viewing.

Kolapore Uplands (MNR - 1980 ha; C.A. - 930 ha)

Presently part of the Kolapore Resource Management Area, this jointly owned property contains a significant geological feature (Duncan Crevice Caves) and is presently used for snowmobiling, cross-country skiing, hiking, hunting and fishing.

Petun (40 ha)

This designated Conservation Area is owned by the Nottawasaga Valley Conservation Authority. It is presently the site of a Scout Camp. A series of limestone caves are located on the property.

Pretty River North (300 ha)

This area is presently part of the Pretty River Valley Park Reserve. A proposed acquisition area lies adjacent to this Crown property.

Rob Roy Forests and Lookout (MNR - 34 ha; C.A. - 48 ha)

This area is presently managed by the North Grey Conservation Authority as an Authority forest.

iii) Intensive Recreation Parks

These proposed parks are recommended for development as recreation areas for intensive activities such as downhill skiing and water-based activities.

Craigleith (73 ha)

Presently known as Craigleith Provincial Park, this area is used for camping and water-based recreation.

Devil's Glen (52 ha)

Presently known as Devil's Glen Provincial Park, this area is used for camping and day-use activities.

iv) Undesignated Proposed Parks

Hidden Lake

This section of the Niagara Escarpment is presently owned by Ontario Hydro and contains a significant geological feature and excellent scenic viewpoints.

3.1.2 Linear Recreation Resources

Linear recreation corridors have become increasingly significant as extensive recreation activities (e.g., cross-country skiing, hiking, riding, canoeing) have grown in popularity. Included in this section are the Bruce Trail, the Ganaraska Trail and several equestrian and canoe routes. Large portions of these linear facilities travel through privately owned lands through mutual agreements with the landowners.

a) <u>Designated Canoe Routes</u>9)

The Gibson-McDonald (Managed by the MNR)

This 56 km circular route begins within the study area at Six Mile Lake Provincial Park and runs north of the study area boundaries as far as Gibson Lake where it turns south to its termination at Six Mile Lake Provincial Park. The route can be completed in three days and is recommended for experienced canoeists who are familiar with portaging. There are a wide variety of campsites to choose from and most of the land through which the route passes is Crown owned. The route is accessed at the park, at McDonald Lake and at Highway 69 on the Gibson River.

Beaver River (Managed jointly by MNR and the North Grey Region Conservation Authority)

This 20 km route begins at Kimberley and runs to Thornbury on Georgian Bay. Canoeing on the section from Heathcote to Thornbury is possible only in the spring and, even then, is not recommended. The route to Heathcote can be completed in four hours. Approximately 50% of the land along the route is privately owned.

Nottawasaga River (Managed by the Nottawasaga Valley Conservation Authority

This 110 km route extends from the Hockley Valley to Wasaga Beach on Georgian Bay. An alternate route can be taken on the Mad River through the Minesing Swamp. Estimated travel time is three to four days. The predominant ownership of adjacent land along the river is private.

b) Trails

Bruce Trail 10)

A portion of the 692 km long Bruce Tràil is contained within the study area. Three-sided shelters are located at certain points along the trail. These and designated campsites are indicated in the Bruce Trail Guide Book. The Bruce Trail has been built and is managed by volunteers. Large sections of the trail pass through private lands with the consent of the owner. Occasionally, changes in owner-ship and carelessness on the part of the hikers have caused landowners to withdraw permission of public access to sections of the trail, resulting in route changes and closures. The trail as mapped on Drawing 5 represents the optimum route.

Ganaraska Trail 11)

The Ganaraska Trail, as planned, will provide a walking route from Port Hope through the Kawartha Lakes and the Huronia area, linking up with the Bruce Trail at Glen Huron in Nottawasaga Township. Certain sections of the trail are incomplete as a result of difficult negotiations with landowners. The Ganaraska Trail is run by volunteers in a manner similar to that of the Bruce Trail.

Ontario Trail Riders Association Trails

The Ontario Trail Riders Association (O.T.R.A.) was formed in 1970 to promote horseback riding and to develop riding trails throughout the province. At present, two bridle trails extend through the study area. The 322 km Heritage Trail extends from Awenda Provincial Park to Bronte Provincial Park near Lake Ontario, and the Huronia Trail runs east from the Heritage Trail for a distance of 162 km. Both pass through predominantly publicly owned lands and rights-ofway. A complete circuit of trails throughout the province is planned.

3.1.3 Recreational Lands Summary

The Collingwood-Midland-Orillia Tourism Zone has a diverse range of Crown owned public recreation lands. A large percentage of these are based on the extensive water resources found within the tourism zone. As well, significant topographical features such as the Niagara Escarpment provide a backdrop for many public recreation areas.

Within the study area, federally owned public lands are limited to Georgian Bay Islands National Park, the Trent-Severn Waterway and its associated public lands, and several federal docks.

At the provincial administration level, 10 provincial parks are found within the region of which eight are Recreation parks, one is a Natural Environment park and one is a Nature Reserve park. All but two of these parks are located adjacent to lakes, either Georgian Bay, Lake Simcoe or some of the smaller lakes in the region. They support structured recreational activities which range from interpretation of archaeological sites and geological features to more traditional recreation activities such as camping, swimming and hiking. In addition to these parks, there are 10 Park Reserves which have the potential for development as Provincial Parks. Other provincially administered recreation lands include three Wildlife Management Areas, five Resource Management Areas and large expanses of unalienated Crown Land, all of which vary in the extent of their development for extensive unstructured recreational opportunities.

At the regional administration level, there are 14 Conservation Areas as well as various other scattered land holdings managed by Conservation Authorities, which provide intensive and extensive recreation opportunities. The Conservation Authority lands are located in the western half of the tourism zone due to the fact that the eastern half does not fall within any Conservation

Authority jurisdiction. The bulk of the county forests are located in the eastern half of the region and support extensive unstructured recreation opportunities such as snowmobiling and hiking.

The proposed Niagara Escarpment Parks System is composed of various lands owned by the Conservation Authorities and the Ministry of Natural Resources. Of the 23 proposed parks, two are presently Provincial Parks, three are Conservation Areas, three are Provincial Park Reserves and the rest are Conservation Authority, MNR management lands and one Ontario Hydro property. Of the 23 proposed parks in this region, two would continue to provide already developed intensive recreation opportunities, and the rest would support varying degrees of development for extensive recreation activities.

Provincially significant linear recreation resources within the tourism zone include three MNR designated canoe routes, two major hiking trails and two OTRA equestrian trails.

3.2 Recreation Facilities (excluding Crown Recreation Land)

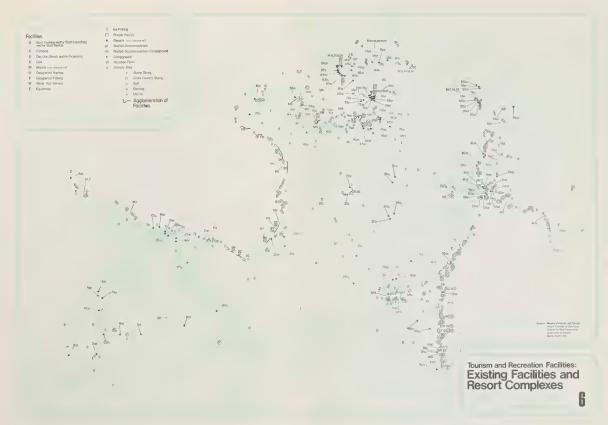
The Collingwood-Midland-Orillia Tourism Zone offers a great diversity of recreational facilities which support some of the best recreational opportunities in Ontario. The facilities located on Drawing 6 were identified in the Ontario Recreational Supply Inventory (ORSI) compiled by the Ministry of Natural Resources. Included in this inventory are government owned and operated facilities, privately owned commercial facilities, and private facilities where admission or use is restricted to club members and their guests. Facilities associated with hotels (e.g. beaches and docks) are considered commercial, despite the fact that use is restricted to hotel guests.

DRAWING NO. 6

TOURISM & RECREATION FACILITIES:

EXISTING FACILITIES & RESORT COMPLEXES

NOT ON CROWN RECREATION LAND





Recreation facilities which cater primarily to a local market rather than to tourists, such as bowling lawns and curling sheets, were omitted from this inventory as were facilities within Federal and Provincial Parks and Conservation Areas which were discussed in the previous section. Resort facilities, which are also shown on Drawing 6 are discussed in Section 3.4 and described in Figure 5, Resort Matrix.

Within the study area, existing facilities support both land-based and water-based activities. The emphasis on water-based recreation in southern Ontario has resulted in notable concentrations of facilities around the extensive shorelines of Georgian Bay, Lake Simcoe and several smaller lakes and along the Trent-Severn Waterway. Water-based facilities include beaches, fishing areas, docks, and water-taxi services, as well as marinas which are listed and described in Figure 3.

Land-based recreation facilities for activities including down-hill and cross-country skiing, hiking, horseback riding, hunting, golfing and camping are more widely dispersed, although there is some concentration of facilities, especially ski areas, along the Niagara Escarpment. Ski areas and their respective facilities are listed in Figure 4.

FIGURE 3

MARINA FACILITIES

Physio- graphic Unit	Landscape Unit		MARINA	Fuel	Launch Facilities	Anchorage	Sewage	Repairs	Rentals	Supplies	General Facilities
Big Head Valley	Big Head Valley	1 2	Richardson Boats Federal Harbour	•	•	12*	•	•	•		•
Beaver	Lower Beaver Valley	3	Federal Harbour		•	•					•
ni	Collingwood Shoreline	4	Federal Harbour	•	•	•					•
Nottawasaga Basin	!/asaga Beach	5 6 7	Riverside Marine Sturgeon Point Wasaga Marine	•	•	24 30 45	•	•	•	•	•
Not	Tiny Township Shoreline	8 9	Federal Harbour Cove Marina	•	•	50	•	•	•	•	
Simcoe Uplands	Peninsula Head	10	Federal Harbour	•		14					

^{*} Map Reference Number

^{**} Number of Slips

FIGURE 3 CONTINUED MARINA FACILITIES

Physio- graphic Unit	Landscape Unit	MARINA	Fuel	Launch Facilities	Anchorage	Sewage	Repairs	Rentals	Supplies	General Facilities
Simcoe Upland	Tay Harbours	11 Federal Harbour 12 Bay Marine 13 Bay Moorings Yacht Club 14 Hindson Marine 15 Jack & Pearl's Place 16 Norse Boat Works 17 Dutchmans Cove 18 Federal Harbour 19 Federal Harbour 20 Downer's Yacht Haven 21 Midland Marina 22 Sunnyside Marina 23 Wye Heritage 24 Duncan's Marina 25 Port Marina 26 Federal Harbour 27 George's Marina 28 Marsh's Marina	• • • • • • • • • • • • • • • • • • • •		110 125 213 270 290 280 70 105 129 115 450 80 65 7	• • • • • • • • • • • • • • • • • • • •	• • • • • • • • • • • • • • • • • • • •	•	• • • • • • • • • • • • • • • • • • • •	
	Simcoe	29 Federal Harbour Coldwater		•	•		•		•	•
Canadian Shield	Georgian Bay Islands	30 Sandy Bay 31 Twin Bridge 32 Dave's 33 Robb'Inns Nest	•	•	43 35 • 50	•	•	•	•	•

FIGURE 3 CONTINUED MARINA FACILITIES

Physio- graphic Unit	Landscape Unit	MARINA	Fuel	Launch Facilities	Anchorage	Sewage	Repairs	Rentals	Supplies	General Facilities
	Georgian Bay Islands	34 Birch Marine 35 Georgian Bay Landing 36 Honey Harbour Club 37 O'Roorke Storage 38 Paragon Marine 39 Village Marine	•	•	35 29 80 175 90 85	• • • • •	• • • • •	• • • • • •	•	•
Canadian Shield	Severn Waterway	40 Bush's Boat Livery 41 Double A Marine 42 Severn Boat Haven 43 Narrows Marina 44 White Falls 45 Severn Marina 46 Nicholson's Marina 47 Blue Moon Camp 48 Six Mile Lake Marine 49 Six Mile Lake Service Centre 50 Wawautusa Trading Post 51 White's Marina 52 T Lake Marina 53 Smith's Marina 54 Snider's Marina 55 Tamarack Park & Marina 56 Federal Harbour	• • • • • • • • • • • • • • • • • • • •	•	60 30 79 100 45 63 102 90 140 45 29 •	•	• • • • • • • • • • • • • • • • • • • •	•	•	•
	Matchedash Lakeland	57 Federal Harbour 58 Lauderdale Marina 59 Martin's Tourist Supplies 60 Shamrock Marina	•	•	75 1	•	•	•	•	•

FIGURE 3 CONTINUED MARINA FACILITIES

Physio- graphic Unit	Landscape Unit	MARINA	Fuel	Launch Facilities	Anchorage	Sewage	Repairs	Rentals	Supplies	General Facilities
Canadian Shield	Lake Couchiching Shoreline	61 Pier II Marina	•	•	47	•	•			•
	Lake Couchiching Shoreline	62 Ojibway Bay Marina 63 Skippers Cove Marina 64 Vollicks Marina 65 Federal Harbour 66 Federal Harbour 67 Federal Harbour 68 Couchiching Marina 69 Crothers Twin Lakes 70 Blue Beacon Marina	•	•	66 30 • • 120 180 85	•	•	•	•	•
Lowland	East Lake Simcoe Shoreline	71 Marina Del Rey 72 Lagoon City	•	•	82	•	•		•	•
Simcoe Lo	West Lake Simcoe Shoreline	73 Dale's Marina 74 Gull Rock Marina 75 City of Barrie Marina 76 MacDonalds Marina 77 Tollendal Marina 78 Federal Harbour Marina 79 Sandy Cove Park Marina 80 Lake Simcoe Marina 81 Monto Reno Marina 82 Lefroy Harbour Company 83 Kon Tiki Marina	•	•	35 55 308 16 82 • 58 100 275 76	• • • • • • • • • • • • • • • • • • • •	•	•	• • • • • • • • • • • • • • • • • • • •	•

FIGURE 4

AREA FACILITIES

SKI

Jonbil Food Services . Ski School Snowmaking Pro Shop Rentals J-bar 2 Коре Том ~ --- 2 Poma Lift Triple Chairlift Double Chairlift \sim 2 \sim \sim 1 \sim T-bar 2 \sim ()3 \vdash ---Cross-country Trails (km) 30 33) 34 183 183 Semi 152 200 200 250 Vertical (m) Private Public AniqlA • • Cross-country 15 Craigleith Ski Club Place 8 01d Smokey Ski Centre Sk1 12 Georgian Peaks 9 Talisman 14 Alpine S Club 10 Beaver Valley Resort 7* Buds Blue Mountain Beaver Valley Slopes Upper Beaver Valley Landscape Unit Physiographic Unit Beaver Valley Niagara Escarpment

FIGURE 4 CONTINUED SKI AREA FACILITIES

roupid	•					•	•
Food Services	•	•	•	•	•	•	•
Ski School	•		•	•	•	•	
Snowmaking	•		•			•	
Pro Shop	•		•	•	•	•	•
s[sin9A	•		•	•	•	•	•
J-bar			-				
Rope Tow	C 1					-	
Poma Lift	9						
Triple Chairlift	3						
Double Chairlift	2			2			
75d-T			2	m		m	
Vross-country (mx) slibaT	15	15			20	12	20
(m) Vertical (m)	213		229	144		107	
Private			•	•			
Public	•	•			•	•	•
Aniq[A	•		•	•		•	
Cross-country	•	•			•	•	•
Ski Centre	16 Blue Nountain	**Scenic Caves Trails	17 Osler Bluff Ski Club	18 Devil's Glen Club	**Wasaga Beach C of C	28 Snow Valley	31 Shanty Bay Country Club
Landscape Unit	Blue Mountain (cont'd.)		Pretty River Valley	Mad River Valley	Masaga Beach	Simcoe Upland	
Physiographic Unit	Niagara Escarpment (cont'd.)				Nottawasaga Basin	Simcoe Uplands	

FIGURE 4 CONTINUED

SKI AREA FACILITIES

	aonbil	•	•		•			
	Food Services	•	•	•	•		•	•
	Ski School	•	•		•	•		
	Snowmaking	•	•		•	•		
	Pro Shop	•	•	•	•	•		•
	z[sjn9A	•	•		•	•	•	•
	J-bar							
	Rope Tow		F1		← 1			
	Poma Lift		\vdash			2		2
	filnish) əlqinl				2			
	JirlaishJ elduoU	2				8		
	75d-T	m	4		m			
	Cross-country Trails (km)	63	25		00	18	35	7
	(m) [soityeV	122	122	16	152	130		46
	Private			Semi				
-	Public	•	•		•	•	•	•
	əniq[A	•	•	•	•	•		•
•	Cross-country	•	•		•	•	•	•
	Ski Centre	32 Horseshoe Valley	33 Medonte Mountain	34 Pine Ridge Ski Club	35 Mount St. Louis	36 Moonstone	37 Lafontaine Ski Trails	40 Mountain View Ski Hills
	Landscape Unit	Oro Sandhills			Medonte Uplands		Peninsula Headlands	Tay Harbours
	Physiographic Unit	Simcoe Uplands (cont'd.)						

3.3 Tourist Accommodation

3.3.1 Commercial Roofed Accommodation

a) Inventory

Commercial roofed accommodation includes hotels, motor hotels, motels, resort lodges, and cottage establishments.

Hotels within the Collingwood-Midland Orillia Tourism Development Zone tend to be relatively small, relatively old, and are generally located in the downtown core of urban areas. Their business is oriented more toward food and beverage sales than the letting of rooms which has a very low priority.

Motor hotels within the study area tend to contain between 70 and 90 units, although 2 establishments contain more than 110 units. The majority have been built since 1968 and are managed by chain affiliated management companies. They are most common in the major urban centres of Collingwood, Orillia and Barrie.

Motels in the study area tend to contain between 10 and 12 units. They are independently owned and managed. The majority of units were constructed prior to 1970.

Resort lodges offer a mix of rooms in a main lodge together with cottage accommodation. They also offer a variety of recreational facilities. Meal service is usually provided on an American Plan (3 meals per day) or Modified American Plan (2 meals per day) basis. The resort lodges tend to contain between 20 and 30 units.

Commercial cottage establishments offer only cottage-style accommodation, usually with housekeeping facilities. Cottage establishments tend to have between 10 and 12 cottages. The majority of units were constructed prior to 1968 and are concentrated along the shoreline of Georgian Bay, most notably at Wasaga Beach.

Table 9 indicates the number of accommodation establishments within each of three categories and the number of units accounted for by each category, and expresses these figures as a percentage of the total within the study area. Provincial statistics are provided for purposes of comparison. In addition, this figure defines the degree to which establishments/units within the study area are seasonal.

TABLE 9

COMMERCIAL ROOFED ACCOMMODATION INVENTORY

	Motor Mote		Resort	Lodges	Cotta Cabi	_
	Estab's.	Units	Estab's.	Units	Estab's	.Units
Study Area Total	145	2808	35	1143	215	2119
Percentage of Study Area Total	37%	46%	9%	19%	54%	35%
Provincial Total	1725	36947	715	10821	3158	29840
Percentage of Provincial Total	31%	48%	13%	14%	56%	38%

	Season	al	Year R	ound
	Estab's	Units	Estab's	Units
Study Area Total	253	3108	142	2962
Percentage of Study Area Total	64%	51%	36%	49%

More than three-fifths (64%) of the establishments comprising slightly over half (51%) of the units are open on a seasonal basis. Over half of the establishments (54%) within the study area offer cottage accommodation, although cottages and cabins account for less than two-fifths (35%) of the available units.

When compared to province-wide statistics, the study area has a greater percentage of motor hotels/motels (37% compared to 31%) but a smaller proportion of motor hotel/motel units (46% compared to 48%). The presence of larger resort lodge establishments within the study area are reflected in a lesser percentage of this type of establishment than the provincial average (10% compared to 13%) and a greater percentage of units (19% compared to 14%).

Statistics presented in Table 9 can be used to derive an average number of units per establishment as follows:

Average N	Number	of	Units	per	Establishment
Motor Hot			Posor	a+	Cottagos/

	Motor Hotels/ Motels	Resort Lodges	Cottages/ Cabins
Study Area	19	32	10
Province	21	15	9

By comparison with provincial averages, motor hotels/motels within the study area tend to be smaller, resort lodges distinctly larger, and cottage establishments slightly larger than their average provincial counterparts.

b) Quality Assessment

The Province of Ontario does not have a grading system which rates the quality of accommodation according to specific objective criteria. Therefore, the quality of accommodation within the study area has been assessed according to

a Quality Matrix presented in Table 10 based upon broad and somewhat subjective criteria. This assessment is founded upon a detailed knowledge of the local tourism industry together with an analysis of building permits issued since 1968 for the construction of commercial accommodation. The results of this quality assessment are found in Table 11.

According to this quality assessment table, almost two-thirds (65%) of the motor hotel/motel units in the zone are identified as old and in fair or poor condition; three-fifths (61%) of the resort lodge units are rated as old and in fair or poor condition; and, most (90%) of the cottage units have been evaluated as old and in fair to poor condition.

Table 12 (page 105) presents a rating of the same accommodation establishments prepared by the American/Canadian Automobile Association for their Ontario Tour Book, 1979.

TABLE 10

ACCOMMODATION QUALITY MATRIX

NEW CONSTRUCTION (units built between January 1977 and September 1979) RECENT CONSTRUCTION (units built between January 1968 and December 1976) OLD CONSTRUCTION (units built prior to December 1967)

GOOD CONDITION: Well built, well maintained, decor in good condition, very clean.	FAIR CONDITION: Moderately well built, average maintenance, decor in reasonable condition, clean.	POOR CONDITION: Poorly built, poorly maintained, decor in poor condition, dirty.
1	2	3
4	5	6
7	8	9

COMMERCIAL ACCOMMODATION QUALITY ASSESSMENT

NUMBER OF UNITS

	Category of Accommodation	Quality*	-	2	m	4	D	9	7	∞	6	Total
ZONE	Motor Hotel/Hotel Resort Lodge Cottage		4	50	1 1 1	36 71 44	728 160 102	60	91	1801 715 1804	58 18 93	2808
	Year Round Seasonal	-	41	20	1 1	91	811	78	182	1723	74	2962
			PE	PERCENTAGE	AGE OF	UNITS	SI					
				2	m	4	D.	9	7	00	6	Total
	Motor Hotel/Motel		× 7 × 0/0	0/0		0/0	26%	2%	300	64%	2%	100%
ZONE	Resort Lodge Cottage		I I	1 f	1 6	0% 0% 0% 0%	60 0% 0% 0%	. ~	0/0 0/0 0/0	% % 20 % 00 %	0/0 0/0	100%

*Based on establishment's position within the Quality Matrix, Table 10.

100%

3,000

38 0/0 0/0

0/0 0/0

0/0

27%

30 0%

Year Round

Seasonal

TABLE 12

COMMERCIAL ACCOMMODATION QUALITY RATING
BY AMERICAN/CANADIAN AUTOMOBILE ASSOCIATION

DIAMONDS*

CATEGORY	1	010	2	%	3	00	4	010	5	0/0	Total
Motor Inn	-	_	2	17	9	75	1	8	-	die	12
Motel	3	25	6	50	3	25	m	-	-	-	12
Resort Motor Inn	-	-	1	33	-	-	2	67	***	-	3
Resort Lodge	**	-	**	-	-	-	1	100	-	400	1
Resort Motel	1	100	***	-		-	-	-	-	-	1
Resort Cottages	-	-	1	100	-	-	-	-	-	-	1
TOTAL	4	13	10	33	12	40	4	13	-	-	30

*Diamond symbols in the AAA guide represent levels of quality, such that one diamond indicates poor quality, while five diamonds indicate very high quality.

Source: American/Canadian Automobile Association: Ontario Tour Book 1979.

c) Demand, Occupancy Mix and Room Rates

i) Major Urban Motor Hotels

Table 13 indicates that 1979 occupancy rates for major urban motor hotels, which are located either in or in close proximity to Orillia, Barrie or Collingwood, improved over 1978 rates. Annual occupancy rates are not high and are subject to considerable seasonal fluctuation. Occupancy rates during the off-peak winter months are improved somewhat by the demand from skiers during January and February.

TABLE 13

ROOM OCCUPANCY RATES FOR MAJOR URBAN MOTOR HOTELS

(as a percentage of available room-nights)

	Annual	Peak Season*	Off-Peak Season
1979	63%	75%	58%
1978	59%	71%	53%

^{*}Peak Season: June 1st - September 30th.

Table 14 emphasizes the importance of the tourist trade to motor hotel operators. During peak season, when occupancy rates are relatively high, tourists account for 49% of occupied room-nights. The occupancy mix also reflects the essentially rural character of the study area where business generated occupancy is considerably less important than it is in the extensively urbanized areas along the north shore of Lake Ontario.

TABLE 14

OCCUPANCY MIX IN MAJOR URBAN MOTOR HOTELS

Percentage of Occupied Room-Nights-

	Peak Season*	Off-Peak Season
Business/Commercial	35%	47%
Tourist	49%	31%
Meetings/Conferences	7%	13%
Tour Groups	6%	2%
Work Crews	2%	3%
Other	<1%	4°0
Total	100%	100%

^{*}Peak Season: June 1st - September 30th.

The average room rate is calculated by dividing the gross annual revenue from room rentals by the number of occupied rooms for the year. The figure derived is slightly lower than published room rates as it allows for discounts, commercial rates, double occupancy and other factors.

Table 15 reveals that room rates for major urban motor hotels within the study area are markedly lower than the provincial average. 1978 room rates within the Collingwood-Midland-Orillia area were 16.6% lower than those for the province as a whole.

It seems unlikely that the average room rates within the study area will increase at a faster rate than of the province as a whole, due to the nature of the occupancy mix.

AVERAGE DAILY RATES PER OCCUPIED ROOM
FOR MAJOR URBAN MOTOR HOTELS

			ONTARIO			STUDY AREA
	\$	% p.a. increase	% higher than study zone	\$	% p.a. increase	% lower than province
1978	33.92	9.8%	19.9%	28.29	10.1%	16.6%
1977	30.89	6.3%	20.2%	25.69	7.5%	16.8%
1976	29.06	3.6%	21.6%	23.90	-1.6%	17.8%
1975	18.05	12.9%	15.5%	24.29	10.1%	13.4%
1974	24.84	-	12.6%	22.07	-	11.1%

ii) Motels

Motels are distributed evenly throughout the study area and average 10 to 12 units. Table 16 reveals a low overall annual demand for motel rooms. Even peak season occupancy rates are relatively low, although demand during the months of June and July can be very high resulting in room shortages in certain areas. Occupancy during the rest of the year, particularly during the spring and late fall, is extremely low.

TABLE 16

ROOM OCCUPANCY RATES FOR MOTELS
(as a percentage of available room-nights)

	Annual	Peak Season	Off-Peak Season
1979	50%	61%	44%
1978	48%	59%	42%

As indicated in Table 17, the motels in the study area are heavily dependent upon the tourist trade which falls off drastically in spring and fall. The large percentage occupancy accounted for by the tourist trade reflects the significance of the summer "pass through" traffic and the winter traffic generated by skiers and snowmobilers. Business/commercial trade is very weak, especially in the off-season.

TABLE 17

OCCUPANCY MIX IN MOTELS

	Percentage of Occu	upied Room-Nights
	Peak Season*	Off-Peak Season
Business/Commercial	20%	25%
Tourist	74%	70%
Meetings/Conferences	<1%	-
Tour Groups	<1%	-
Workcrews	5%	5%
Other	-	400
TOTAL	100%	100%

^{*} Peak Season: June 1st to September 30th.

In 1977, it was estimated that the average daily rate per occupied motel room was \$17.70, while in 1978 this rate had dropped slightly to \$17.40. Gross revenues from rooms are increasing less quickly than occupancy rates thus depressing the average room rate. Again, this rate is significantly lower than the rates for equivalent accommodation in the province as a whole.

iii) Resort Lodges

Resort lodges within the study area generally tend to contain between 20 and 30 units, although some are larger than this. Accommodation provided usually consists of a mix of

rooms in a main lodge and cottages. Occasionally rooms are all within the lodge, or are all in cottages. Meal service is always provided in the main lodge on an American Plan basis, i.e. inclusive of meals.

Resort lodges are, for the most part, seasonal operations. Year-round resort establishments are more properly categorized as resort hotels. The season for resort lodges varies according to location, but tends to last from mid-May to mid-October - 20 weeks in all. In 1979, it was estimated that 69% of all available room/unit-nights were occupied over the entire season.

Most of the lodges depend heavily (90%) upon the tourist trade for customers. A number of lodges cater to conventions and meetings which tend to comprise the rest of the demand for resort lodge accommodation.

Weekly rates for these establishments can vary significantly from daily rates, and frequently rates within individual establishments vary according to the type and style of accommodation offered. However, it appears that resort lodges within the study area tend to earn, on average, approximately \$225 per unit per week over the length of the season. Therefore, over a 20 week season, the gross revenue of a 25 unit lodge would be \$127,000. In terms of average daily rate per occupied room the 1979 rate would be \$52.17, including meals.

iv) Commercial Cottages

Commercial cottage establishments within the study area generally offer cottage-style accommodation only, usually with house-keeping facilities. Establishments tend to contain between 10 and 12 cottages. The vast majority of units

were constructed prior to 1968, and are open only for a short period during the summer. Most such establishments open during the last week in May (Victoria Day) and remain open until the first week of October (Thanksgiving). Most of their business is conducted during July and August between Dominion Day and Labour Day.

Cottage occupancy is more difficult to calculate than room occupancy of motor hotels and motels. This difficulty is a result of the fact that operators keep records of numbers of guests, rather than numbers of rooms occupied, and of the frequency of weekly or extended rentals rather than nightly rentals. In addition, record keeping in this sector of the accommodation industry is not strong.

A more telling statistic is the revenue generated during the course of the season. In 1978, it appears that the average cottage establishment grossed \$855 per cottage. Given an 18 week season (May 24 to September 30), average weekly revenue can be estimated at \$47.50 per cottage. Assuming that 90% of all revenue is gained during the 9 weeks of July and August, average weekly revenue is seen to be approximately \$85.50 per cottage. Gross revenue for a typical 11 cottage housekeeping cottage establishment over an 18 week season is, therefore, approximately \$9,400.00.

3.3.2 Campsites and Trailer Parks

Table 18 indicates that Provincial/National Park campsites comprise 18% of the total number of sites available in the study area. The majority of these government-run sites are unserviced, while the majority of sites in private campgrounds have electrical and water hookups.

TABLE 18

CAMPSITE AND TRAILER PARKS INVENTORY

	Total Sites	90	With Elec. Hookup	2 %	With Water Supply	Σ %	Unser viced	
Commercial Sites	5140	82%	3626	71%	3046	59%	1514	19%
Provincial/ National Park Sites	1160	18%	131	11%	-	-	1029	89%
TOTAL	6300	100%	3757	60%	3046	48%	2543	40%

Most private campgrounds and trailer parks contain a combination of seasonal and transient sites. Seasonal sites are leased on an extended basis for the entire season, while transient sites are rented on an overnight basis. The ratio of seasonal to transient sites varies, but appears generally to be 75:25.

The majority of campgrounds open during the first two weeks of May and close either on Labour Day (first week of September) or Thanksgiving (first week of October). On average, the season lasts 16 weeks.

Table 19 shows that the demand for transient campground accommodation is heavily concentrated in the two months of July and August. Seasonal rentals, however, tend to account for many of the sites in the private campgrounds and, therefore, more evenly distribute the level of demand.

TABLE 19

OCCUPANCY RATES FOR CAMPSITES

(as a percentage of available campsites)

	1979	1978	1977
Provincial/National Parks	52%	52%	51%
Municipal	21%	17%	n/a
Private	54%	60%	51%
Total	46%	44%	n/a

Jı	uly-August		
	1979	1978	1977
Dury in sigh / Notice of Double	770	700	750
Provincial/National Parks	77%	76%	75%
Municipal	41%	34%	n/a
Private	84%	91%	81%
Total	72%	70%	n/a
Total	120	100	11/ a

Average 1978 revenue per occupied site-night from campsites alone was \$4.87. Revenue from campsites and other revenues was \$6.56 per site-night. Equivalent 1977 figures were \$4.09 and \$5.71 respectively. Rental of seasonal sites is generally more lucrative than rental of transient sites.

3.3.3 Private Cottages

Table 20 contains available data on the number of private cottages in the study area. For the purposes of this study we have accepted the higher figure of 19,516.

TABLE 20 ESTIMATED NUMBER OF PRIVATE COTTAGES 1978

	Ontario Hydro: No. of Intermittent Occupancy Customers 1978	Ontario Ministry of Revenue Estimate
Simcoe County Flos ¹⁾ Matchedash Medonte Nottawasaga Orillia Oro Sunnidale Tay Tiny Vespra Innisfil Mara Rama	3,337 732 254 621 1,204 918 23 1,084 4,681 37 1,500 1,473 828	
TOTAL SIMCOE CO	JNTY 16,692	14,582 ⁶)
Grey County		
Artemesia Collingwood Euphrasia Osprey St. Vincent	.648 ³⁾ 1,433 271 158 314	578 ⁴) 1,332 176 95 253
TOTAL GREY COUN	TY 2,824	2,434
OVERTALL TOTAL	19,516	17,016

Notes:

- 1 Includes 3,120 estimates by Wasaga Beach Hydro.
- 2 Presently unavailable for Simcoe County.
- 3 Does not include Flesherton or Markdale as these are municipal. 4 Includes Flesherton (3) and Markdale (4).
- 5 Stevenson & Kellogg estimate.
- 6 1977 Assessment Roll data.

3.4 Resorts

For the purpose of this study, a resort has been defined as a recreational facility, or accommodation in combination with a recreational facility, which, on its own, draws non-residents or tourists to a particular area. Frequently, it is difficult to determine whether a recreational facility is a distinct and independent tourist attraction or if its attraction is dependent upon complementary facilities or upon its location within a larger tourism area or along a tourism corridor. In order to comply with the stipulation that a resort be a tourist attraction in its own right, the following criteria were established:

A resort was to provide two or more of the following facility types as determined by the ORSI listing, during one season, with or without accommodation:

- a) Beach
- b) Tennis and/or Swimming Pool
- c) Golf Course
- d) Boat Rentals
- e) Equestrian Facilities
- f) Alpine Skiing or Cross-Country Skiing Facilities
- g) Trails (cross-country skiing/hiking/snowmobiling)
- h) Designated Hunting and/or Fishing Areas.
- . Vacation farms qualified without these conventional facilities due to their agrarian activity orientation.
- Due to the prominence of skiing as a tourist attraction in the study area, alpine and cross-country ski areas qualified as resorts without a second facility if they were listed with the Ontario Ski Resorts Association and/or in the ORSI listing.
- . Private facilities and clubs were included if they are open to the public to some degree.

The resorts were then divided into the following categories:

- a) Accommodation Resorts
- b) Accommodation Resorts with Camping
- c) Campground Resorts
- d) Activity Areas
- e) Vacation Farms

A comprehensive list of resorts is presented in Figure 5 according to their respective categories. The locations of these resorts are indicated on Drawing 6.

3.5 Tourism Support Services

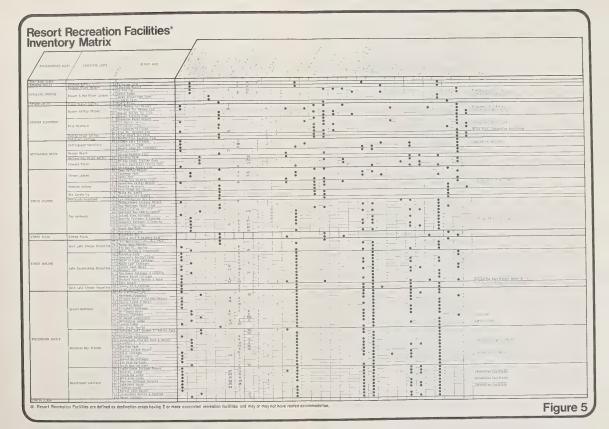
Support services, as shown on Drawing 7, are those services which cater to the tourist's basic needs, including food and beverage establishments and automotive service centres.

The inventory of food and beverage establishments was derived from the comprehensive lists provided by the Grey-Owen Sound Health Unit, the Simcoe County Health Unit and the District of Muskoka Health Unit. Information for the service station inventory was provided by the major oil companies. Independent stations have not been inventoried and are not shown on Drawing 7.

Food and beverage establishments and service stations are well distributed throughout the study area, although, predictable, concentrations exist in and around the larger service centres, i.e., Orillia, Collingwood, Barrie and Midland. A concentration of 47 seasonal food and beverage establishments at Wasaga Beach is noteworthy as it emphasizes the seasonal character of this recreational community.

FIGURE 5

RESORT FACILITIES





DRAWING NO. 7

TOURISM AND RECREATION FACILITIES: SUPPORT SERVICES







3.6 Transportation

The tourism and recreation industry within the Simcoe-Georgian area of Ontario is dependent to a great extent on the accessibility of its attractions by private automobile. Present trends indicate that, within the immediate future, the automobile will continue to be the primary mode of travel for the purposes of tourism and recreation within this area.

The study area, by virtue of its proximity to Metropolitan Toronto and other major urban areas, is within a comfortable travelling distance of a large portion of the population of southern Ontario. Most of the area is afforded a high degree of accessibility by the existing system of Provincial and County roads.

In the future, air, rail and bus services to the main population centres may become increasingly important for tourism and recreational travel, depending upon the impact of energy considerations on overall travel patterns. Drawing 8 indicates the location and extent of major roads as well as air and rail linkages.

3.6.1 Provincial and County Roads

The existing road network is based upon a hierarchy of Provincial and County roads. This road network connects and serves the major urban areas such as Barrie, Orillia, Midland and Collingwood, as well as the numerous towns and activity centres throughout the study area.

A high degree of accessibility to and from the study area is provided by the Provincial highway systems. Highways of primary importance include:

- Highway No. 400, a divided freeway,
- Highway No. 11, a divided expressway, Highway No. 12, Highway No. 24,

- Highway No. 26
- Highway No. 27, and
- Highway No. 69.

DRAWING NO. 8

TRANSPORTATION





The aforementioned highways greatly facilitate vehicular movement within the study area, as well as inter-regional movement.

The network of county roads provides connections between highways as well as between towns and major activity centres. County roads of primary importance include:

- . County Road No. 2,
- . County Road No. 6,
- . County Road No. 10,
- . County Road No. 11, and
- . County Road No. 29.

County roads, in some cases, provide direct access to primary recreation centres such as Wasaga Beach, Thunder Bay and other areas along the shores of Lake Simcoe and Georgian Bay.

3.6.2 Traffic and Transportation Considerations

Traffic volumes within the study area have wide seasonal variations. During the summer months, between June and September, traffic volumes on the major provincial highways are approximately 15 to 40 percent higher than they are during the winter months. Seasonal variations are largely due to the tourist traffic either visiting the area or passing through it. The greatest seasonal variance is recorded for the stretch of Highway No. 2 which runs from Elmvale at Highway No. 27 to Wasaga Beach. Summer traffic SAWDT* volumes generated by Wasaga Beach's water-based recreation attractions averaged 54% greater than Average Annual Daily Traffic (AADT) volumes between 1973 and 1978. Highway No. 69 running north from Waubaushene also recorded a high seasonal variance with SAWDT volumes averaging 46.1% higher than AADT volumes over the same time period. 12)

^{*} Volumes from July 1 to August 31 excluding weekends from noon Friday to Sunday evening and to noon Monday on long weekends.

Throughout the year, both the Provincial and County road networks operate at high levels of service. During the summer months, isolated locations may provide lower levels of service because of decreased operating speeds, mainly due to high traffic volumes.

Reduced traffic speeds are most often caused by the relatively slow movement of recreational vehicles, intersection and entrance turning movement delays and weekend tourism rush hour peaks.

The majority of traffic volumes, in both the summer and winter months, are accommodated by the Provincial highway system. Highways which carry the greatest traffic volumes include Highways 400, 11, 9, and 17. 12)

3.6.3 Traffic Projections

Historical trends indicate that traffic within the study area will experience an average yearly growth rate of 6 to 8 percent. Greater increases in traffic volumes are anticipated along the north-south facilities, such as Highway 400, 11 and 27. Lower growth trends are exhibited along secondary facilities such as 26/27. Summer daily traffic (SAWDT) volumes have experienced much the same growth rate as those of the average annual daily traffic (AADT). It can be expected that, under normal circumstances, the above growth rate will continue in the near future for road facilities within the study area.

3.6.4 Proposed Road Improvements and Additions

The Provincial highway system is continually under review and study for the implementation of planned programs of improvements to the existing facilities as well as the construction of new ones. Major construction programs currently underway include the twinning of Highway 400 from Barrie to Highway 12. Under a staged

program of construction, the section between Barrie and County Road No.11 has been completed, the section between County Road No.11 and Highway 27 is under construction, and the section between Highway 27 and Highway 12 is being designed and is expected to be under construction within five years. A new interchange will be provided at Highway 400 and Highway 27.

Other programs of continuing improvements include resurfacing, minor widenings, the provision of truck climbing lanes and intersection improvements.

3.6.5 Transportation Summary

The existing road network in the study area, combined with the continuing program of improvements and additions, can be expected to accommodate all vehicular activity, both in the summer and winter months at high levels of service under safe operating conditions.

The existing and proposed road network is felt to be able to accommodate, satisfactorily, increases in traffic activity throughout the study area due either to the development of new tourism and recreational activities and/or the planned growth of the major urban centres.

In addition to the ease of travel and flexibility provided by the existing and planned road network, the potential exists for the increased utilization of other modes of transportation, including, air, rail and bus to and within the study area.

3.7 Events and Attractions

The events and attractions inventoried in this section are felt to provide significant motivation for people to travel to the study area. An attraction refers to a resource based on a specific facility which appeals to tourists due to its inherent features or

characteristics, or due to the experience it may provide. An event refers to an organized activity or celebration which takes place within a specific time period.

Following the initial inventory, the events and attractions were divided into the following classifications which are referred to in Figure 6.

N - Natural

C - Cultural; including religious, musical, historical, ethnic, winter carnivals, and other attractions and events

S - Sports

A - Agricultural

I - Industrial

Events and attractions are located on Drawing 9.

FIGURE 6

COLLINGWOOD-MIDLAND-ORILLIA TOURISM ZONE

FVENTS AND ATTRACTIONS

Physiographic	Landscape		L	(
Unit	Unit	Map Ref.	Event/Attraction	Season	Classification
Precambrian Shield	Severn Waterway	3	Wildwood Camperland Zoo		z
Simcoe Uplands	Peninsula Headland	37	Charlebois Sugar Bush Roi's Sugar Bush	Spring	zz
	Tay Harbours	32	Wye Marsh Wildlife Centre	Spring & Summer	z
		33	Summer Antique Market - Midland	Summer	<u>ن</u>
		333	Midland Winter Festival	Winter	U
		33	30,000 Island Boat Cruises	Summer	S
		33	Midland Fall Fair	Fall	Ø.
		33	Castle Village Gift Shop		₩
		34	Penetanguishene Winterama	Winter	O
		34	Georgian Queen Cruise of 30,000 Islands	Summer	S
	Simcoe Upland	d 29	J. Narraway's Sugar Bush	Spring	z
		29	Coldwater Agricultural Fair	Fall	A
		23	Oro Agnicultunal Fair	Fall	V
		25	George Langman Wildlife Sanctuary		Z
		17	Midhurst Tree Nursery		Z
		17	Victorian Christmas - Simcoe County Museum	Winter	_

Uplands Cont'd.	Medollice	30	Silverbirch Aquarium		Z
	Uplands	20	J. Lamrie's Sugar Bush MacDonald's Sugar Bush	Spring Spring	zz
	Oro Sandhills Moraine	22.	L.B.K. Buffalo Ranch Antique Show & Sale - Horseshoe Valley	Fall	zz
Simcoe	West Lake Simcoe Shoreline Lake Couchiching Shoreline	24 14 14 14 14 28 26	Shaw's Pure Maple Products Barrie Agricultural Fair Gryphon Theatre Company Barrie Winter Carnival Huronia Festival of Arts & Crafts Kempenfest Kempenfelt Dog Show & Regatta Quilt and Rug Fair Barrie Raceway R.G. Carter Sugar Bush Sportsman Spring Fair Canadian Open Bass Championship	Spring Summer Summer Summer Summer Fall Fall Spring Summer	z < U U U U U U N U N Z N N
		26 26 26	Santa Claus Parade Orillia Winter Carnival Leacock Festival of Humour	Fall Winter Summer	U U U

Simcoe Lowlands Cont'd.	Mara Drumlin Field	27	Talbot River Pickerel Spawn Run	Spring	Z
Simcoe Plain	Simcoe Plain	15	Molson's Brewery Park Fairgrounds Cookstown Agricultural Fair	Summer	C&S A
Nottawasaga Basin	Wasaga Beach	E E E E E E E E E E E E E E E E E E E	Go-Kart Track Mini-Golf Super Slide Arts & Crafts Show Winter Jamboree Ontario Zoological/Botanical Park	Summer Summer Summer Winter Spring/Summer	v v v o o z
	Collingwood Shoreline	=======================================	Agricultural Fair Shipbuilding and Launching Blue Mountain Pottery Kaufman House Furniture Factory Summerfest Kinsmen Club Antique Sale Winterfest Go-Karts Snow Golf Tournament Fall Fair (Great Northern Exhibition) Santa Claus Parade	Late Summer Summer Fall Winter Winter Fall	K H H H O O O O O O O
	Tiny Township Shoreline	35	Go-Kart Racing	Summer	· · ·

Norrawasaya	Elmvale Plain	∞	Jungle Zoo		Z
Basin		19	Greenlaw's Sugar Bush	Spring	Z
Cont'd.		19	Lalonde's Sugar Bush	Spring	Z
		19	Ken Ritchie's Maple Orchards	Spring	Z
		19	Agricultural Fair		A
		19	Elmvale Maple Syrup Festival	Spring	z
	Stayner Plain	72	Stayner Horticultural Society Flower Show	Summer	z
		12	Stayner Agricultural Fair	Summer	V
Niagara	Blue Mountain	6	National Freestyle Championship Finals	Winter	S
Escarpment		6	Colt 45 Downhill Speed Trials	Winter	S
		10	Cross-Country Ski Races	Winter	S
		10	Scenic Caves	Summer/Fall	Z
		10	Blue Mountain Concert Shell	Summer	U
		10	Blue Mountain Foundation for the Arts		U
		10	Colt 45 Country Show and Amateur Yodelling Contest	Summer	U
		0	Pepsi Cola Bluegrass Festival and Five String Banjo Contest	Summer	U
		10	Blue Mountain Winter Carnival	Winter	U
		10	Labatts Pro Challenge	Winter	S
		.10	Blue Mountain Slide Ride	Summer	S

z v	ONAZO	C A A C	CZA
Spring/Fall Winter	Winter Spring Fall Spring Winter	Fall Fall Summer Fall	Summer/Fall Fall Spring Summer
Artemesia Botanical Gardens Talismand Winter Carnival	Beaver Valley Winter Carnival Beaver Valley Rat Race Beaver Valley Agricultural Fair Trout Spawning Run An Old Fashioned Christmas	Flesherton Split Rail Festival Feversham Agricultural Fair Markdale Agricultural Fair Fall Fair	Agricultural Fair (Euphrasia Memorial Centre) Meaford Apple Festival Trout Spawning Runs Western Days
9 /	2222	2 8 4 4	m
Beaver Valley Slopes	Lower Beaver Valley	Beaver & Mad River Uplands Saugeen River Upland	Rocklyn Plain Bighead Valley
Niagara Escarpment cont'd.	Beaver	Horseshoe Moraines	Bighead

DRAWING 9

TOURISM AND RECREATION FACILITIES: EVENTS AND ATTRACTIONS





NOTES

3.0 TOURISM FACILITIES AND SERVICES INFRASTRUCTURE

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4.0 ARCHAEOLOGICAL AND HISTORIC RESOURCES

Huronia, or the region lying roughly within the boundaries of Georgian Bay in the north and northwest, the Niagara Escarpment to the west, and Lake Simcoe in the south and southeast, is a significant area within the context of Ontario history and prehistory. Examinations of the numerous archaeological sites distributed throughout the area have shed much light on the changing cultures of Ontario's indigenous peoples. The advent of European fur-traders and settlers to the region and subsequent growth of settlement is well documented by the 50 or more historic plaques, which have been erected and in the many museums established for this purpose.

Archaeological and historic sites, important historic land and water routes and museums have been located on Drawing 10. An overview of the more significant features are presented in the following sections.

4.1 Archaeological Resources

As indicated by Drawing 10, two types of archaeological sites have been mapped. The "potential" sites represent areas which, on the basis of reports of local residents and others familiar with the area, are suspected of containing archaeological artifacts, but which have not actually been investigated in detail. The "developed" sites are those which have been examined and documented, either by the Ministry of Culture and Recreation or other recognized archaeologists. ¹⁸,19)

Drawing 10 also shows three fairly distinct concentrations of archaeological sites within the study area. One concentration is a broad band extending from the northwest shore of Lake Simcoe in a southeasterly direction to the Tiny-Tay Peninsula. For purposes

DRAWING NO. 10

HISTORICAL/ARCHAEOLOGICAL RESOURCES





of discussion, this band will be referred to as the Simcoe-Penetang area. The Nottawasaga River and Minesing Swamp are also surrounded by a large number of identified sites. The third high density area is the area immediately to the east of the Niagara Escarpment. A brief chronological summary of these resources is presented in Figure 9.

4.1.1 The Simcoe Penetang Area

The sites examined in this area to date range in age from prehistoric to post-European contact. Some of the earliest artifacts uncovered are from the Archaic Woodland period, which extends from 1000 B.C. to 400 B.C. ¹⁴⁾ A few isolated camps are all the evidence of this period within the study area, and these are located in Tay and Oro Townships.

Tiny, Tay and Medonte Townships contain some scattered remains of the Middleport period, from approximately 1200 to 1400 A.D. The remains of large longhouses and ossuaries (communal burial pits) found in these village and camp sites are characteristic of Ontario Iroquois tribes of the period. These "middle farmers" were some of the first people to practise any type of agriculture in the area. They were not extremely numerous, as most Iroquois were located further to the south and east.

The Lalonde tribes of "climax farmers" (1400 to 1600 A.D.) are represented by a number of settlements and camps distributed throughout the Huronia area. With the cultivation of beans and squash in addition to corn by these tribes, agriculture as a way of life gained a strong foothold in the area. From this group, the Huron and Petun groups came to be differentiated. As migrations and resultant warfare increased, the historic Huron and Petun (Wendat) Confederacy was established. This era was marked by the emergence of huge, new central settlements.

FIGURE 7

CHRONOLOGIC SUMMARY OF ARCHAEOLOGIC RESOURCES 14)

Theme	Theme Segment	Specific Developments	Relevant Dates
Environmental Frontiersmen	Lake Forest Archaic		7500 B.C 500 B.C.
Indigenous Settlers, Traders & Potters	Early Ceramicists	Woodland	1000 B.C 400 B.C.
	Saugeen Peoples	Nottawasaga River	600 B.C 200 A.D.
Indigenous Peoples' Farming Societies	Middle Farmers	Georgian Bay, Middleport	1300 A.D 1400 A.D.
	Climax Farmers	Lalonde, ProtoHuron, Shield Iroquois	1400 A.D 1600 A.D.
The Northern Hunters & Fishers	Peoples of the Iroquoian Zone	Iroquoian	900 A.D Contact
Post-Contact Tribes & Bands	Huron	Acceptance of trade goods, dispersal, missions	1560-1650
	Petun	Emergence & dispersal (Collingwood area)	1560-1650
	Neutral	Emergence & dispersal (Niagara Escarpment)	1580's-1653
	Iroquois	Seneca dispersal to Quinte and Toronto, Mission	1666-1680's
	Mississauga	Displacement southward to Huronia, Toronto, Lindsay, Peterborough	late 18th- early 19th century
	Northern	Increasing acceptance of trade goods, population displacements	17th-18th centuries

The remains of Huron settlements and camps are by far the most common type of archaeological artifact in the Huronia area. Pre-European contact, contact, and post-contact (historic) periods are all well represented throughout the area, although post-contact sites are especially common in the Midland-Pentanguishene area.

A number of provincially significant archaeological sites are located within the Awenda Provincial Park Reserve. 10,13) The first discovery made in 1966, was of a two component site with an early Huron or Lalonde village situated beside and partially overlapped by a historic Huron village. It is thought that the latter may be the site of Ihonatiria where Father Brebeuf and other Jesuit priests are reported to have spent two years with the Hurons. The Second Lake site, unearthed in 1968, was determined to be a large, prehistoric Huron village. The Methodist Point site, also found in 1968, is thought to be a large campsite of Iroquoian and possibly Middle Woodland origin. The discovery of these sites has shed much light on the cultural changes which have taken place in Huronia over the last few centuries.

A proposal has been submitted by the local Chamber of Commerce and a Metis group to develop a proto-historic village known as Cahiaque, near the entrance to Bass Lake Provincial Park west of Orillia. ¹⁸⁾

4.1.2 The Nottawasaga Area

Approximately 25 sites are centred around the Wasaga Beach area. The majority of these are considered to be camps and burial grounds of the Saugeen people (600 B.C. to 200 A.D.). These people made intensive use of specific ecological zones and possessed a strong seasonal site bias. They were active participants in a variety of trade networks. ¹⁴⁾ On the basis of archaeological evidence unearthed in 1974, ¹⁶⁾ it appears that the Minesing Swamp and Nottawasaga River served as a fishing, gathering and

hunting area for Archaic and Early Woodland period Algonquin Indians (approximately 2000 B.C. to 1000 A.D.). Five seasonal fishing camps are located around the periphery of the swamp.

The only evidence of agricultural settlement near the swamp is the remains of a settlement on the dry upland to the east. A large collection of artifacts, and the distinct east-west longhouse patterns make this a very interesting archaeological site. This is apparently a classic Iroquoian Middleport agricultural settlement dated about 1300 A.D., suggesting the presence at that time of up to 1,000 Indians.

From 1400 to around 1650 A.D., (late Woodland period) the area was used by the Iroquois for fishing and beaver/muskrat trapping. Permanent villages were located about 12 miles away, in Huronia and Petun.

After the fall of Huronia in 1649, the swamp became more important as a beaver hunting ground for the Iroquois.

4.1.3 The Niagara Escarpment

A few isolated archaeological sites attributed to peoples of the Archaic, Woodland, and Lalonde periods are located in this area, although the majority of finds to date have been traced to the Petun people. These sites are thought to have been inhabited between the historic and post-contact periods (1560 to 1650 A.D.).

4.2 Historical Resources

The historical resources of the study area are discussed in a different manner than the archaeological resources. The relatively high mobility of the European fur traders and settlers, and their resultant widespread influence over the study area makes a

study of their activities on a geographical basis rather disjointed. An examination of historical resources on a thematic basis would, therefore, appear to be a more logical approach. French influences are dealt with first, followed by the more recent military and naval history of the area. The Trent-Severn Waterway is discussed separately, in recognition of its impact on the historical development of the region. A final section is devoted to the shipbuilding and transportation history of Collingwood. These themes have been derived through discussions with the Historical Planning and Research Branch of the Ontario Ministry of Culture and Recreation. ¹⁵⁾

4.2.1 Francophone Influence

The first white man to visit the Huronia area is reported to be Etienne Brule, who arrived in Georgian Bay by way of the French River in 1610. He was sent to learn the customs and language of the Hurons by Champlain who visited the bay himself in 1615 with the intent of leading the Hurons in an expedition against the Iroquois. The expedition was unsuccessful, however, and Champlain was forced to spend a winter in Huronia at Carhagouha with the Hurons. Champlain was accompanied on this trip by Father Joseph Le Caron, a Recollet Priest, who celebrated the first mass in present-day Ontario at Carhagouha. The two men returned to Quebec in the spring.

In 1632, Father Le Caron returned with Father Nicolas Viel and Brother Gabriel Sagard, all Recollets, (a branch of the Franciscans), accompanied by a band of Frenchmen. Le Caron settled at Carhagouha, Viel at Toanche and Sagard at Ossossane, although all came together at Carhagouha after a short time. There are historic plaques located on these sites today. By 1625, all had returned once more to Quebec, except Viel who was drowned by Hurons north of Montreal Island. "Le grand voyage du pays des

Hurons" by Sagard, an account of their stay in Huronia, and a dictionary of the Huron language are two valuable sources of information about the life of Old Huronia left to us by the Franciscans.

The first visit by Jesuit priests to Huronia lasted from 1619 to 1626. Brebeuf, who was to be the future apostle of Huronia, and others established themselves at Toanche for three years until the colony fell to the British Kirke Brothers during the conflict between England and New France. They returned to Quebec once more, until 1634 when they set up residence at Ossossane. In 1640, they were transferred to Sainte-Marie.

Sainte-Marie prospered for a decade. During the first few years, crops were planted and residences, a church hospital and long-house shelters for visiting Hurons were constructed. The settlement became largely self-sufficient.

The Iroquois nation to the south became envious of the Huron - French trading alliance and Iroquois raids increased in frequency. In 1648, 2,000 Hurons and Father Daniel were killed or captured. In 1649, two villages near Sainte-Marie were destroyed and Father Brebeuf, Father Lalemont and hundreds of Hurons were tortured and killed. 8)

The remaining Jesuits decided to establish a new Sainte-Marie (Sainte-Marie II) on Christian Island with several thousand Hurons. Sainte-Marie I was stripped of its stores, livestock and religious materials, and burned, to prevent the Iroquois from desecrating their work of a decade.

The year 1650 witnessed the end of the Huronia mission. The winter of 1649 was a time of great illness and starvation. In the spring, the Jesuits and 300 remaining Hurons left for Quebec. $^{8)}$

The Francophone influence is still very much in evidence in the Tiny-Tay Peninsula. The present-day Sainte Marie among the Hurons, near Midland, is the result of decades of archaeological and historical reconstruction work. Archaeological excavations began in 1941, and reconstruction was completed in 1968. Films and a "sound and light" show allow visitors to experience Sainte-Marie rather than just visit it. In 1970, the museum of Sainte-Marie among the Hurons was opened. At the eastern entrance of Little Lake Park in Midland is a reconstruction of a Huron settlement prior to European contact. Guided tours are conducted through the palisaded village, and a film entitled "We the Hurons Lived Here" depicts Huron lifestyles and customs.

Martyrs' Shrine, just east of Midland on Highway No. 21, was opened in 1926 as a memorial to the eight martyred saints. 21)

The Town of Lafontaine is an example of a modern-day French Canadian settlement in the area. "Habitant" style cabins made of squared logs are still in evidence.

4.2.2 Military and Naval History

British concern over American activities in the Great Lakes reached a peak after 1794 when the Americans, by military and diplomatic effort, won the south shore of the Great Lakes. The entire southern flank of both the British east to west line of communications and their fur trading route was thereby disrupted by American occupation. British boats and property were being seized by the Americans at Niagara and Detroit as they journeyed to outposts on the upper lakes.

The Nottawasaga River, including Willow Creek and the Nine Mile Portage from Willow Creek to Kempenfelt Bay was a well-established fur trade route by this time. After the developments along the American border, the potential of this route was more carefully examined by the British military.

During the War of 1812, the British were defeated at Put-In-Bay on Lake Erie and their access to the Upper Lakes by way of Lake Erie was blocked. If they could not supply their posts in the northwest, especially Michilimackinac (Sault Ste. Marie), they ran the risk of losing the support of Indian allies in that area. It was feared that the fur trade would suffer and that Michilimackinac might fall to the Americans. 1)

In 1814, a road was cut from Kempenfelt Bay to the landing at Willow Creek where storehouses were erected. The relief force set out for Michilimackinac from the swamp in April, and arrived in May. The Nancy, a North West Company vessel, was refitted as a provisioning boat and began the voyage from Michilimackinac to the Nottawasaga mouth for supplies.

Failing in their attempts to take Michilimackinac in July, the Americans attacked the Nottawasaga post to cut off their source of supplies. In the course of this attack, the Nancy and the blockhouse were destroyed. Two British batteaux loaded with provisions did manage to leave the mouth of the Nottawasaga a few days later, however, and safely reached Michilimackinac. These ships eventually destroyed the Scorpion and the Tigress, the two American ships responsible for the sinking of the Nancy.

By the late fall of 1814, the British once more had a small fleet on Lake Huron, a valuable supply line, a continued Indian alliance and a strong fur trade.

In 1815, Schoonertown was established near the mouth of the Nottawasaga to serve as a temporary naval establishment on Lake Huron while a permanent establishment was being constructed at Penetanguishene which has a natural harbour and was considered an ideal location for an active naval base. An immense storehouse, offices, workshops, barracks, and homes were erected, many of which have been reconstructed. 15)

The North West Company had, as early as 1810, suggested that a road be built from Kempenfelt Bay to Penetanguishene. This suggestion was an outcome of the annoyance and financial losses resulting from the American seizures of boats and property at Niagara and Detroit. The War of 1812 underlined the need for a quick, easy route to the upper lakes. By the end of 1814, construction had begun on the Penetanguishene Road.

Many difficulties were encountered, mainly due to the preconception that roads should be straight, rather than adaptive to topographic irregularities. By the end of the war, little progress had been made, and the momentum had been lost. By 1817, a road was finally put through to Penetanguishene, although many sections were reported to have been virtually impassable except during the winter. Some sections of this route have been incorporated into the present Highway No. 27.

Competition from this road eventually led to the decline of the Nottawasaga route. Today the Nottawasage Valley Conservation Authority owns the Old Fort Willow site. The fort itself was restored several years ago, but has since been burnt down by vandals. No further attempts at restoration have been made. In 1965, a museum, theatre and lighthouse were built on the site of the sinking of the Nancy and are owned by the Ontario Ministry of Culture and Recreation.

Although the Penetanguishene Road was originally put through largely as a result of demand by the military for an alternate communication/transportation link between the upper and lower Great Lakes, its most important function was eventually that of a colonization road.

Settlement was encouraged along this route, as settlers contributed to the upkeep of the road. In the 1830's, substantial settlement of the area north of Lake Simcoe began. With the

1840's came the Barrie and Penetanguishene Stage Line. Twice a week the stage coach met a steamboat at Barrie which carried passengers to Penetanguishene. This was apparently a very uncomfortable journey, as development of the road did not keep pace with settlement. The Coldwater portage route, from Orillia to Coldwater became a favoured alternative, with steamers crossing Lake Simcoe from the Holland Landing and entering Lake Couchiching via the Atherley Narrows. 5)

The impact of the Penetanguishene military and naval establishment itself on the growth of the surrounding area is not considered to be very wide-reaching, although there was some influence on social and economic developments in the surrounding area. Voyageurs moved from Drummond Island to reside under British rule here. St. James-on-the-Lines Church was built midway between the establishment and the town, where it stands today. The naval and military establishment today is a living historical community consisting of offices, homes, workshops, barracks and the original stone officers' quarters. Regimental soldiers demonstrate parade drills and musketry.

4.2.3 Trent-Severn Waterway

The many rivers and lakes making up the Trent-Severn Waterway have been used since prehistoric times as a transportation corridor between Lake Ontario and Georgian Bay. At the time of Champlain, various nations of the Iroquoian family were residing in the area of the Trent-Severn Waterway. The Huron homeland was located between Georgian Bay and Lakes Simcoe and Couchiching, and the Petuns, or Tobacco Nation, occupied the area between the Bruce Peninsula and Collingwood. The Five Nations of the Iroquois League resided south of Lake Ontario. 4)

Prior to the arrival of the Europeans, there had been a relatively constant war between the Wendat Confederacy (Huron and Petun Indians) and the Iroquois League. This fighting was fairly well-balanced, and was not disruptive of overall tribal life. By the end of the 17th century, however, fur traders were lending their support to various groups in order to utilize fur trading areas along the Trent-Severn route. In 1615, Champlain travelled down this system with Huron allies to attack an Iroquois village. It was largely as a result of this interference that the Hurons and Petuns were eventually decimated and the area taken over by the Iroquois. Indian fish weirs in the Atherley Narrows at Orillia remain as evidence of these former cultures.

For about 300 years, commencing in the early 1600's, the Trent-Severn corridor was used mainly by the Europeans in the fur trade. With the advent of the uprising in the Thirteen Colonies and the defeat of the British in the late 18th Century, the Trent-Severn area was innundated by a wave of Loyalists from south of the border. By 1818, all territory from Lake Ontario to Georgian Bay had been purchased from the Ojibway Indians. In 1830, the Objibways were granted 9,800 acres from Coldwater to the Atherley Narrows, along which houses were constructed. In 1838, the Indians were moved from the good agricultural land of this reserve to reserves at Rama and Beausoleil Island.

By 1837, a small settlement had formed at Orillia, and the old Indian portage became the portage road from Orillia to Coldwater. In the 1830's also, Yonge Street was extended from Toronto to Penetanguishene via the Penetanguishene Road. Steamboats travelled on Lake Simcoe and through the Narrows into Lake Couchiching. The Trent-Severn area was rapidly being opened up, and settlers began to talk of connecting the various lakes to enable boats and lumber rafts to traverse the entire Kawartha and Trent-Severn area.

In 1833, pressure from residents and growth of the timber trade resulted in the commencement of work on the Trent Canal at Bobcaygeon. By 1872, about 171 miles of lakes and rivers were opened to navigation from Healey to Lakes Simcoe and Couchiching. Work on the Severn section was suspended during World War I, and finally completed in 1920. The Couchiching Lock near Washago was opened in 1920 and the marine railways at Big Chute and Swift Rapids were completed in 1919.

The arrival of the railway eventually led to the commercial decline of the canal. In 1971, jurisdiction over the canal was transferred from the Department of Transportation to Parks Canada in recognition of the fact that the canal then served, mainly, recreational boating needs.

The locks themselves and the lockhouses are being preserved as historic sites. Private residents have restored or preserved many other historic buildings associated with the canal. The Canada-Ontario Rideau-Trent-Severn (CORTS) Study Committee has recommended that docks be constructed to give boaters access to historic sites along the route, such as the Leacock Memorial Home in Orillia. Other important historic sites in the Orillia area are the bronze statue of Champlain, and the plaque erected to the memory of Chief William Yellowhead (who fought for the British in the War of 1812) in the Couchiching Beach Park. Plans are being formulated by CORTS to develop a more comprehensive historic interpretation program along the entire waterway. 2) A number of themes have been devised by CORTS to be used as guidelines for the type of development which may take place. 20) These themes are classified as primary or secondary, according to whether reference is being made to the waterway itself, or to the secondary or regional characteristics of the corridor in general. Each node along the waterway has been assigned a rank of 1, 2 or 3 as an index of its interpretive priority and potential. These are summarized for locations within the study area in Figure 8.

FIGURE 8

SUMMARY OF INTERPRETIVE THEMES FOR THE TRENT-SEVERN WATERWAY

Node Swift Rapids Couchiching Port Severn Samebridge Big Chute Talbot Theme Human History: 1. The Ancestors of Native Peoples 2. The French Presence: traders, explorers, and missionaries 3. Settlement of the Trent-Severn: saw mill and mill town Canal Themes: 4. The Construction of the Canal 5. Canal Technology Natural Environment Theme: 6. Ecosystems Secondary Themes: 7. Glacial and Post-Glacial Fluvial Processes 8. Bedrock Geology 9. Recreation History 10. Boats 11. Square Timber Subculture 12. Mossom Boyd 13. Peter Robinson 14. Trent Migratory Corridor 15. Transportation History Rating:

Finally, in a Greenpaper released in May, 1978, 3) CORTS made the following recommendations regarding preservation and conservation of historic and archaeological sites.

Heritage Conservation

"That all municipalities within the Rideau-Trent-Severn corridor appoint a Local Architectural Conservation Advisory (LACA) Committee and, with the assistance of this Committee, carry out archaeological and heritage building surveys, and identify and designate the appropriate heritage structures and heritage districts in their municipality."

"That all municipalities develop the appropriate heritage concerns as heritage policy in the municipal Official Plan and the municipalities be encouraged to use their LADA Committee for assistance in developing this policy."

"That any land developer has the responsibility to carry out the appropriate heritage survey, including archaeological, of the property and area that is proposed for development or re-development."

Environmentally Sensitive Areas

"That by April 1, 1981, the governments prepare a list of environmentally sensitive natural and historical areas characteristic of the CORTS that warrant special status or management."

4.2.4 The Collingwood Shipbuilding Industry

Prior to 1855, the steamer activity on Georgian Bay was local and limited. However, the coming of the Northern Railway to Collingwood from York in 1855 brought about a rapid change. Three distinct Georgian Bay steam trade routes subsequently developed: a local route servicing only Georgian Bay, a route from Collingwood and Owen Sound to Lake Superior and another to Chicago and other American ports. Collingwood played a role in the opening of the west as ships set out from here for the Red River Rebellion. 1)

After the arrival of the railway, a large sawmill was built in Collingwood by the S. C. Kennedy Company which had rights to the forests along the Nottawasaga River. The character of the land surrounding Georgian Bay changed completely over the last half of the 19th century. The majority of the forests were felled, wheat started flowing in from the west and grain elevators were built in Collingwood. Shipyards were built here in 1833, and, with the advent of the railway, a tourism industry began to develop in the area.

By the year 1900, the lumber industry had dwindled and the steamer industry, for which lumber was the mainstay, declined drastically. In the early 1900's, Collingwood was the only Georgian Bay port from which steamers sailed.

The year 1901, however, marked the beginning of a new era of shipping on the Great Lakes as the <u>Huronic</u>, the first steel ship to sail the Great Lakes, was launched at Collingwood. 1) During World War II, the Collingwood shipyards built vessels for the Canadian, British and American naval forces. Nowadays, the type of craft most regularly launched at Collingwood is the bulk freighter. These ships, often up to 730 feet long, are the longest vessels that can pass through the St. Lawrence Seaway. In addition to these, a variety of tankers, package freighters, and even some passenger vessels have been produced. The shipyards are the biggest industry in Collingwood, employing about 1,000 people. They have had an obvious, long-lasting impact on the development of the southern Georgian Bay area.

NOTES

4.0 HISTORICAL AND ARCHAEOLOGICAL RESOURCES

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5.0 TOURISM USE PATTERNS, MARKETS AND TRENDS

5.1 Introduction

This section provides quantitative and qualitative data on the tourism markets for the study area.

5.1.1 Organization of the Section

The characteristics of travellers to the study area are presented for travellers from each major market segment. The characteristics of the trips taken by these travellers are also presented again, for each major market segment.

The level of visitation and penetration of the major markets are determined. Short term market forecasts are provided for each year for the years 1980 - 1984 for each market segment.

The following geographic market segments are considered:

- Ontario residents;
- Other Canadians;
- U.S. Residents.

Ontario residents have been further segmented to identify the Metro Toronto market separately. Forecasts have been prepared for international visitation. Because of inadequate data the characteristics of international travellers and the trips they take to the study area have not been identified.

Specialty markets and activity preferences are identified. Data sources and their limitations are analysed and presented in Figure 14; the geographic boundaries for the different data surveys are shown on Drawing 11.

Finally, societal trends and influences that will shape the travel patterns of the future are discussed.

5.2 Traveller and Trip Characteristics

5.2.1 Traveller Characteristics

- a) Age of Travellers
 - i) Metro Toronto

TABLE 21

AGE OF HEAD OF HOUSEHOLD TAKING TRIP

Origin	Destination		
Metro Toronto	Georgian Lakelands	Province of Ontario	
16 - 24 years	3.1%	6.1%	
25 - 34 years	20.3%	27.0%	
35 - 44 years	23.1%	24.4%	
45 - 54 years	34.7%	26.8%	
55 - 64 years	12.3%	9.7%	
65 + years	6.5%	6.0%	

Source: 1976 Ontario Household Survey

Well over half the heads of Toronto households visiting the area were over 44 years old. 54% of the heads of Metro Toronto households visiting the area were 45 or more years old. For similar households visiting destinations in the rest of Ontario 43% were 45 or more years old.

TABLE 22

AGE OF HEAD OF HOUSEHOLD TAKING VACATION TRIP

Origin	Destir	<u>Destination</u>		
Metro Toronto	Georgian Lakelands Per Cent	Province of Ontario Per Cent		
16 - 24 years	-	-		
25 - 34 years	10.9%	6.8%		
35 - 44 years	25.0%	21.2%		
45 - 54 years	51.4%	28.3%		
55 - 64 years	8.2%	9.1%		
65 + years	4.5%	5.8%		

Source: 1976 Ontario Household Survey.

The average age of people taking vacation trips in the area was even higher.

Of Metro Toronto residents taking a vacation trip in the area 64% of the heads of households were 45 or more years old, and of these 51% were between 45 and 54 years old.

ii) Ontario

TABLE 23

AGE OF HEAD OF HOUSEHOLD TAKING TRIP

Origin	. Destination	
Ontario	Georgian Lakelands	Province of Ontario
16 - 24 years	4.9%	6.0%
24 - 34 years	26.1%	29.7%
35 - 44 years	22.9%	24.1%
45 - 54 years	26.7%	22.6%
55 - 64 years	11.5%	10.1%
65 + years	7.9%	7.5%

Source: 1976 Ontario Household Survey.

The average age of the head of households visiting the area tends to be older than for visitation to the province as a whole.

The average age of the head of Ontario households visiting the area were 45 or more years old. For similar households visiting destinations in the rest of the province 40% were 45 or more years old.

TABLE 24

AGE OF HOUSEHOLD TAKING VACATION TRIP

Origin	<u>Destination</u>		
<u>Ontario</u>	Georgian Lakelands	Province of Ontario	
16 - 24 years	1.2%	4.9%	
25 - 34 years	18.2%	25.1%	
35 - 44 years	25.9%	27.9%	
45 - 54 years	38.5%	25.8%	
55 - 64 years	9.1%	9.1%	
65 + years	7.1%	7.2%	

Source: 1976 Ontario Household Survey.

The average age of people taking vacation trips in the area was even higher.

Fifty-five per cent of the head of Ontario households taking a vacation trip in the area were 45 or more years old, and of these 39% were between 45 and 54 years old.

iii) Other Canadian Residents

TABLE 25

AGE OF PERSON TAKING TRIP TO THE GEORGIAN BAY ECONOMIC REGION FROM CANADIAN PROVINCES OTHER THAN ONTARIO DURING JULY, AUGUST, SEPTEMBER 1978

Age:	Under 20 years	14.3%
	20 - 34 years	51.0%
	36 - 44 years	13.2%
	45 - 64 years	14.0%
	65 years and over	7.5%

Source: 1978 3rd Quarter Canadian Travel Survey.

The age of travellers to the region from the other provinces of Canada was much younger than that of visitors from Ontario or the U.S. By comparison with the other markets there was a high percentage of travellers in the 20 - 34 year old range.

Because of the size of the sample the figures should be interpreted with caution but it would appear that overall, travellers to the area from the rest of Canada tend to be younger than those from Ontario or the U.S.

iv) U.S. Residents

TABLE 26 AGE OF PERSON. TAKING TRIP TO THE GEORGIAN LAKELANDS TAA FROM THE U.S.

Age	Per Cent
Under 20 years	28.2%
20 - 34 years	22.6%
35 - 44 years	14.9%
45 - 64 years	21.9%
65 years and over	12.4%
TOTAL	100.0%

Source: 1973 - 74 U.S. Auto Exit Survey.

The age of U.S. visitors to the region tended to be older than the population as a whole. One third (34%) of the visitors were 45 or more years old. The number of visitors in the 20 - 34 age range was relatively low by comparison with other markets.

b) Education of Travellers

Origin

i) Metro Toronto

TABLE 27

EDUCATION OF HEAD OF HOUSEHOLD TAKING TRIP

Destination

Metro Toronto	Georgian Lakelands TAA	Province of Ontario	
Public or Grade School	10.9%	10.0%	
Some High School	26.7%	21.4%	
Graduated High School	19.4%	23.1%	
Some University	6.2%	6.9%	
Graduate University	11.2%	14.0%	
Post Graduate University	11.0%	10.4%	
Some Community College	7.2%	8.2%	
Grad. Community College	7.4%	6.0%	

Source: 1976 Ontario Household Survey.

The educational profile of Metro Toronto residents visiting the areas was very similar to that of Toronto residents visiting destinations in the provice as a whole. The only slight difference was the larger number of visitors who did not graduate from high school and marginally fewer visitors to the area who did not attend university.

ii) Ontario

TABLE 28

EDUCATION OF HEAD OF HOUSEHOLD TAKING TRIP

<u>Origin</u> <u>Destination</u>		ion
Ontario	Georgian Lakelands TAA	Province of Ontario
Public or Grade School	16.8%	17.7%
Some High School	25.5%	23.9%
Graduated High School	19.4%	19.3%
Some University	6.3%	6.6%
Graduated University	9.2%	10.4%
Post Graduate Univers	ity 8.3%	7.2%
Some Community College	7.9%	8.5%
Grad. Community Colle	ege 6.6%	6.4%

The educational profile of Ontario residents visiting the area was very similar to that for visitation to the province as a whole. In terms of education the visitors to the area were no different to those visiting the rest of the province.

iii) Other Canadian Residents

TABLE 29

EDUCATION OF PERSON TAKING TRIP TO GEORGIAN BAY ECONOMIC REGION FROM CANADIAN PROVINCIES OTHER ONTARIO DURING JULY TO SEPTEMBER 1978

	Per Cent
Public School	80.3%
Some Post Secondary	
Technical/Vocational/Jr. College	9.1%
University Degree	10.5%

Source: 1978 3rd Quarter Canadian Travel Survey.

The educational profile of visitors from other Canadian provinces to the Georgian Bay Economic region was broadly similar to that for visitors from Ontario.

Comparing the 1978 3rd Quarter Canadian Travel Survey profiles for other Canadian residents with Ontario residents a very similar profile for public school education and university education was evident. The only marginal difference was between technical and post secondary education. This was probably a definitional distinction rather than actual.

iv) U.S. Residents

There are no reliable data for the educational profiles of U.S. visitors to the area.

c) Household Income

i) Metro Toronto

TABLE 30

TOTAL INCOME OF METRO TORONTO HOUSEHOLDS

VISITING THE AREA

Origin - Toronto	Destination	
Total Household Income	Georgian Lakelands TAA Per Cent	Province of Ontario Per Cent
Under \$6,000	5.6%	5.9%
\$ 6,000 - 8,999	4.0%	6.4%
\$ 9,000 - 11,999	7.5%	6.6%
\$12,000 - 14,999	12.1%	10.5%
\$15,000 - 19,999	15.2%	17.0%
\$20,000 - 24,999	22.9%	26.9%
\$25,000 - 39,000	21.9%	17.9%
\$40,000 +	10.8%	8.8%

Source: 1976 Ontario Household Survey.

Metro Toronto households visiting the area were more affluent than those visiting destinations elsewhere in the province. Of Metro Toronto residents visiting the area in 1976 33% had total household incomes of \$25,000 per annum (p.a.) or more. Of those visiting the rest of Ontario 27% had total annual household incomes of \$25,000 p.a. or more.

ii) Ontario

TABLE 31

TOTAL INCOME OF ONTARIO HOUSEHOLDS

VISITING THE AREA

Origin - Ontario	Destination	
Total Household Income	Georgian Lakelands TAA <u>Per Cent</u>	Province of Ontario Per Cent
Under \$6,000	8.0%	7.4%
\$ 6,000 - 8,999	7.7%	9.8%
\$ 9,000 - 11,999	8.5%	9.2%
\$12,000 - 14,999	13.5%	14.3%
\$15,000 - 19,999	17.6%	18.6%
\$20,000 - 24,999	19.1%	20.5%
\$25,000 - 39,999	19.1%	15.9%
\$40,000 +	6.5%	4.3%

Source: 1976 Ontario Household Survey.

Ontario residents visiting the area were more affluent than those visiting the rest of the province.

The household income of Ontario residents visiting the area tended to be marginally higher than for residents visiting other destinations in the province. In 1976, 26% of Ontario residents visiting the area had a total household income of \$25,000 p.a. or more. For those visiting destinations in the rest of the province only 20% had total household incomes of \$25,000 p.a. or more.

iii) Other Canadian Residents

TABLE 32

TOTAL HOUSEHOLD INCOME OF PERSONS FROM CANADIAN PROVINCES OTHER THAN ONTARIO WHO VISITED GEORGIAN BAY ECONOMIC REGION JULY 1 TO SEPTEMBER 1978

	Per Cent
Under \$9,000	2.8%
\$ 9,000 - 19,000	44.3%
\$20,000 - 29,999	49.0%
\$30,000 and over	3.9%

Source: 1978 3rd Quarter Canadian Travel Survey.

The household incomes of travellers to the region from the rest of Canada were much lower than those of residents of Ontario. Forty-seven percent of the households of travellers to the region from the rest of Canada had a total income of less than \$20,000 per annum in 1978. By comparison only 25% of the households of travellers to the region from Metro Toronto had a total income of less than \$20,000 per annum in 1978.

This low income figure is a function of the low average age of travellers visiting the region from the rest of Canada. Again these figures must be interpreted with care but overall it would appear that travellers to the area from the rest of Canada were less affluent than those from the other markets.

iv) U.S. Residents

There are no reliable data available for household incomes of U.S. residents visiting the area.

d) Party Size

i) Metro Toronto

TABLE 33

AVERAGE PARTY SIZE OF TORONTO RESIDENTS VISITING THE AREA

Origin - Metro Toronto

Destinations

Average Party Size	Georgian Lakelands TAA	Province of Ontario
1 person	24.0%	15.6%
2 persons	45.8%	32.2%
3 persons	13.8%	15.1%
4 persons	11.5%	22.1%
5 persons	2.2%	8.1%
6 or more persons	2.7%	6.9%

Source: 1976 Ontario Household Survey.

Toronto residents tended to visit the area in small groups. 70% of Toronto residents visiting the area were in groups of one or two persons. For Toronto residents visiting destinations in the rest of Ontario 48% were in groups of one or two persons.

Party size tended to be much smaller therefore than the provincial average.

ii) Ontario

TABLE 34

AVERAGE PARTY SIZE OF ONTARIO RESIDENTS

VISITING THE AREA

Origin - Ontario	Destination				
Average Party Size	Georgian Lakelands TAA	Province of Ontario			
1 person	28.4%	15.3%			
2 persons	39.4%	31.1%			
3 persons	12.4%	15.2%			
4 persons	13.3%	22.2%			
5 persons	4.4%	10.0%			
6 or more persons	2.1%	6.0%			

Source: 1976 Ontario Household Survey.

Average party size of Ontario residents visiting the area was smaller than the provincial average.

Sixty-eight per cent of Ontario residents visiting the area were in groups of one or two persons. For destinations in the rest of the province one or two member groups comprised 47% of the visitors.

iii) Other Canadian Residents

TABLE 35

AVERAGE PARTY SIZE OF PERSONS TAKING TRIPS TO GEORGIAN BAY ECONOMIC REGION FROM CANADIAN PROVINCES OTHER THAN ONTARIO DURING JULY TO SEPTEMBER 1978

Size of Party	Per Cent
1 person	4.5%
2 persons	29.9%
3 persons	13.7%
4 persons	40.7%
5 persons	11.2%
6 or more persons	-

Source: 1978 3rd Quarter Canadian Travel Survey.

The majority of travellers to the region from the rest of Canada travelled in groups of four persons (41%) or two persons (30%). There were very few single travellers (5%).

By comparison with travellers from Ontario party sizes of other Canadian residents were much larger. During the summer of 1978, 52% of travellers from the rest of Canada travelled to the region in groups of 4 or more, while only 37% of Ontario residents visiting the region did so.

iv) U.S. Residents

The average size of party of U.S. residents visiting the Georgian Lakelands TAA in 1973-74 was estimated to be 2.78 persons. The average size of party of U.S. residents visiting Ontario during that year was estimated to be 2.53 persons. This included day and overnight visitors. Thus parties to the area tend to be approximately 10% larger than those to the province as a whole.

Since 1973 party sizes have declined.

AVERAGE SIZE OF U.S. PARTIES VISITING ONTARIO

BY AUTOMOBILE FOR ONE OR MORE NIGHTS

1973 - 1978

Year	Average Party Size (persons)
1973	2.71
1974	2.70
1975	2.68
1976	2.65
1977	2.65
1978	2.61

Source: Statistics Canada Catalogue 66-201, 1973 - 1978 Tables 20 and 21.

It is likely that parties to the Georgian Lakelands TAA have declined in size at the same rate.

Thus since 1973 there has been a decline in the number of U.S. parties visiting Ontario together with a shrinking party size. This has been a steady decline during the last decade.

5.2.2 Trip Characteristics

- a) Purpose of Trip
 - i) Metro Toronto

TABLE 37

VOLUME OF PERSON TRIPS ORIGINATING IN METRO TORONTO

TO ALL DESTINATIONS IN 1976 BY PURPOSE OF TRIP

Origin					Destinatio	n		
Metro Toronto	Grey Simco Count	e	Georgia Lakelan Travel Assr	nds	Provinc · Ontar		All Destinat	ions
Type of Trip	Person Trips (000's)	Col %	Person Trips (000's)	Col	Person Trips (000's)	Col	Person Trips (000's)	Col
Vacation	645	22.4	1,295	21.3	3,217	15.8	5,507	22.4
	1,404	48.8	3,444	56.5	9,129	44.9	9,487	38.6
Personal ²⁾	722	25.1	1,102	18.1	6,726	33.0	7,539	30.7
Business ³⁾	108	3.7	252	4.1	1,280	6.3	1,046	8.3
TOTAL	2,879	100.0	6,093	100.0	20,352	100.0	24,579	100.0

Notes:

- 1) Non-Vacation Trip is defined as a weekend or weekday recreational trip.
- 2) Personal Trip is defined as a trip taken to visit friends and/or relatives, shopping, medical appointments, weddings, etc.
- 3) Business Trip is defined as a trip for business purposes excluding daily travel from home to work.

Source: 1976 Ontario Household Survey

Recreational trips to the area were high.

In 1976, 71% of person trips orginating in Metro Toronto to Grey and Simcoe Counties were recreational trips, i.e. vacation or non-vacation trips. This was high in comparison with trips to destinations in Ontario as a whole.

For the Georgian Lakelands area this combined percentage was even higher, with 78% of all person trips originating in Metro Toronto being for recreational purposes.

Almost half the trips were weekend/weekday recreational trips.

49% of the person trips taken by Metro Toronto's Residents to Grey and Simcoe Counties in 1976 were non-vacation trips, that is weekend or weekday recreational trips. Of all trips taken within Ontario by Metro Toronto's residents, 45% were non-vacation trips.

Grey and Simcoe Counties got 47% of all person trips taken by Toronto's residents to the Georgian Lakelands TAA. However, they only got 41% of the non-vacation person trips.

This would suggest that the region is getting less than its share of such trips. There is consequently potential to attract more weekend/weekday recreational trips originating in Metro Toronto as visitors have to pass through the two counties to get to Muskoka or Bruce Counties. These two counties, together with Dufferin County, comprise the remainder of the Georgian Lakelands TAA.

Business trips from Toronto to the region were low.

Over 6% of trips taken within Ontario by the residents of Metro Toronto were for business purposes. Less that 4% of trips to the region from Metro Toronto were for business reasons.

TABLE 38

RECREATIONAL PERSON TRIPS ORIGINATING IN METRO TORONTO TO GREY AND SIMCOE COUNTIES

Volume of Person Trips to Grey and Simcoe Counties originating in Metro Toronto as a percentage inating in Metro Toronto as a of all such trips to the province of Ontario in 1976.

Volume of Person Trips to Georgian Lakelands TAA origpercentage of all such trips to the province of Ontario in 1976.

Origin - Metro Toronto

Type of Trip	Per Cent	Per Cent
Vacation	20.0%	40.3%
Non-Vacation	15.4%	37.7%
Personal	10.7%	16.4%
Business	8.4%	19.7%
TOTAL	14.1%	29.9%

Source: 1976 Ontario Household Survey

Overall, recreational trips were high, personal and business trips were low.

In 1976 Grey and Simcoe Counties got 14% of all person trips originating in Metro Toronto to a destination in Ontario. The region got 17% of all vacation and non-vacation person trips taken by the residents of Metro Toronto in Ontario but only 11% of personal person trips and 8% of business person trips.

The region has a high porpensity to attract recreationally oriented person trips, particularly vacation person trips, and a relatively low propensity to attract personal or business trips.

ii) Ontario

TABLE 39

VOLUME OF PERSON TRIPS ORIGINATING IN ONTARIO

TO ALL DESTINATIONS IN 1976 BY PURPOSE OF TRIP

Origin	Destination							
Metro Toronto	Grey & Georgian La Simcoe lands Trav Counties Association			vel Province of			All Destinations	
Type of Trip	Person Trips (000's)	Col %	Person Trips (000's)	Col	Person Trips (000's)	Col %	Person Trips (000's)	Col
Vacation	1,109	18.9	2,426	19.4	9,157	13.6	15,936	19.5
Non-Vacation	2,331	39.6	5,664	45.3	21,969	32.5	24,066	29.4
Personal	2,137	36.4	3,801	30.4	30,978	45.8	34,460	42.2
Business	302	5.1	613	4.9	5,478	8.1	7,258	8.9
TOTAL	5,879	100.0	12,504	100.0	67,582	100.0	81,720	100.0

Source: 1976 Ontario Household Survey.

Recreational trips to the region were dominant.

By comparison with the provincial average, there was a high percentage of vacation and non-vacation person trips to Grey and Simcoe Counties. In 1976, the combined percentage for destinations within the Province as a whole was 46%, whereas for Grey and Simcoe Counties, 58.5% of all person trips were for vacation or non-vacation purposes.

For the Georgian Lakelands Travel Association Area, the combined percentage was even higher (65%). Almost two thirds of all person trips were for vacation or non-vacation purposes.

Non-vacation trips were high.

Again, both for Grey and Simcoe Counties, and the Georgian Lakelands Travel Association Area as a whole, the percentage of non-vacation person trips was high by comparison with those taken in the rest of the Province.

However, although Grey and Simcoe Counties got 47% of all person trips to the Georgian Lakelands Travel Association Area, the two counties only got 41% of non-vacation person trips. This suggests that more weekend and weekday recreational person trips than expected were taken outside of Grey and Simcoe Counties in the other counties of the Georgian Lakelands Travel Association Area.

Business trips to the region were low.

In 1976, 8% of all person trips within Ontario taken by residents of Ontario were for business purposes. Only 5% of all person trips both to Grey and Simcoe Counties and the Georgian Lakelands Travel Association Area were for business purposes.

TABLE 40

VOLUME OF PERSON TRIPS TO GREY AND SIMCOE COUNTIES AS A PERCENTAGE TRIPS TO GEORGIAN LAKELAND TRAVEL ASSOCIATION AREA

Origin - Ontario

Type of Trip	Per Cent
Vacation	45.7%
Non-Vacation	41.2%
Personal	56.2%
Business	49.3%
TOTAL	47.0%

TABLE 41

VOLUME OF PERSON TRIPS TO GREY AND SIMCOE COUNTIES AS A PERCENTAGE OF PERSON TRIPS TO THE PROVINCE OF ONTARIO

Origin - Ontario

Type of Trip	Per Cent
Vacation	12.1%
Non-Vacation	10.6%
Personal	6.9%
Business	5.5%
TOTAL	8.7%

Source: 1976 Ontario Household Survey.

Overall, recreational trips were high, personal and business trips were low.

In 1976, Grey and Simcoe Counties got 9% of all person trips originating in Ontario to a destination within Ontario. The region got approximately 11% of all the vacation and non-vacation person trips taken by residents of Ontario within Ontario, but only 7% of all personal person trips and 6% of business person trips.

Quite clearly the area has a high propensity to attract recreationally oriented person trips, and a relatively low propensity to attract personal and business visitation.

1978 data confirms these conclusions.

The 3rd Quarter 1978 Canadian Travel Survey complements the above conclusions. In the summer of 1978, 69% of all person trips taken by the residents of Ontario to the Georgian Bay Economic Region were for pleasure purposes. For the province as a whole it was only 56%. Similarly personal and business person trips to the region taken by the residents of Ontario were much lower than the provincial average. For the Georgian Bay Economic Region the combined percentage for these types of trips was just 5% of all person trips, compared with 14% for the province as a whole.

TABLE 42

VOLUME OF PERSON TRIPS TO THE GEORGIAN BAY ECONOMIC REGION ORIGINATING IN ONTARIO DURING JULY - SEPTEMBER 1978 BY PURPOSE OF TRIP

Origin - Ontario			Person Trips to Georgian Bay Economic Region as a
Type of Trip	Person Trips ('000)	Per Cent	Percentage of all Person Trips to Ontario
			Per Cent
Pleasure	2,262	69.0%	32.4%
Visiting	838	25.6%	22.8%
Personal	90	2.7%	12.1%
Not Stated	7	0.2%	7.2%
TOTAL	3,279	100.0%	26.1%

Source: 1978 3rd Quarter Canadian Travel Survey, Statistics Canada

TABLE 43

VOLUME OF PERSON TRIPS TO THE PROVINCE OF ONTARIO ORIGINATING IN ONTARIO DURING JULY - SEPTEMBER 1978 BY PURPOSE OF TRIP

Origin - Ontario	<u>Destination</u> C	<u> Intario</u>
	Person Trips	
Type of Trip	('000')	Per Cent
Pleasure	6,982	55.7
Visiting	3,676	29.3
Personal	745	5.9
Business	1,042	8.3
Not Stated	97	0.8
TOTAL	12,542	100.0

Source: Table 6.1 p. 109, Person Trips CGOT Table Request.

iii) Other Canadian Residents

TABLE 44

VOLUME OF PERSON TRIPS TO GEORGIAN BY ECONOMIC REGION FROM CANADIAN PROVINCES OTHER THAN ONTARIO DURING JULY, AUGUST, SEPTEMBER 1978 BY PURPOSE OF TRIP

Type of Trip	Person Trip	Per Cent
Business	_	_
Visiting	5,500	10.6
Pleasure	46,500	89.4
Personal	-	55.4
TOTAL	52,000	100.00
TOTAL	52,000	100.00

There are very limited data on visitation to the region from the rest of Canda. The most recently published survey covering the area is the Canadian Travel Survey for the 3rd Quarter of 1978. The vast majority of trips to the region from the rest of Canada occur during this summer quarter.

During July - September 1978 89% of visits to the region were pleasure trips, vacations or recreational trips during the week or on weekends. The remainder of the trips were made to visit friends and relatives in the region.

iv) U.S. Residents

TABLE 45

VOLUME OF PERSON TRIPS ORIGINATING IN THE U.S. TO THE GEORGIAN LAKELANDS TAA IN 1978 BY PURPOSE OF TRIP

Type of Trip	Person Trips	Per Cent
Visiting friends and relatives	48,000	21.9%
Business	13,000	6.1%
Pleasure	157,000	72.0%
Personal	-	69
TOTAL	218,000	100.0%

Source: 1973-74 U.S. Auto Exit Survey (Extrapolation)

The data contained in Table 45 are extrapolated from the 1973 U.S. Auto Exit Survey. The actual numbers are therefore indicative rather than precise. However, it would appear that approximately 3 out of 4 person trips to the area made by U.S. residents was for pleasure purposes. Approximately one in five person trips was to visit friends and/or relatives.

b) Trip Duration

i) Metro Toronto

TABLE 46

VOLUME OF DAY AND OVERNIGHT PERSON TRIPS

TO GEORGIAN LAKELANDS AND ONTARIO FROM METRO TORONTO

1976 BY PURPOSE OF TRIP

<u>Origin</u>	G -	Georgian Lakelands Travel Association Area			<u>P</u> :	rovince	of Ontario	
Metro Toronto	Day	Trips	Overnigh	t Trips	Day T	rips	<u>Overnight</u>	Trips
Type of Trip	Person Trips (000's)	_%	Person Trips (000's)	_%	Person Trips (000's)	_%	Person Trips (000's)	<u></u> %
Vacation	132	10.2	1,163	89.8	234	7.3	2,983	92.7
Non-Vacation	619	18.0	2,825	82.0	2,397	26.3	6,732	73.7
Personal	375	34.0	727	66.0	3,369	50.1	3,357	49.9
Business	123	48.8	129	51.2	609	47.6	671	52.4
TOTAL	1,249	20.5	4,844	79.5	6,609	32.5	13,743	67.5

Source: 1976 Ontario Household Survey.

80% of the person trips to the area from Metro Toronto involved an overnight stay. For all trips to the province as a whole, only 68% did so.

Almost half (46%) of all the person trips to the area from Metro Toronto were weekend/weekday recreational trips which involved an overnight stay. In terms of market segments this is by far the most significant type of trip to the area.

49% of the business trips to area from Metro Toronto did not involve an overnight stay. This was only slightly different to the provincial average.

Despite the proximity of Grey and Simcoe Counties to Metro Toronto the region only got 17% of all of Metro Toronto's day non-vacation person trips in 1976. The area ranked third after Festival Country and Central Ontario. Festival Country, the Niagara Falls, Hamilton, Waterloo/Kitchener area, attracted 32% of these day trips in 1976.

By contrast the remainder of the Georgian Lakelands area was the most popular destination for overnight non-vacation trips taken by Toronto residents in 1976. The counties of Bruce, Dufferin and Muskoka attracted 26% of such person trips. Again the two counties of Grey and Simcoe ranked third with 14% of such trips.

TABLE 47

DESTINATION OF NON-VACATION PERSON TRIPS
TAKEN BY RESIDENTS OF METRO TORONTO 1976

Destination	Day Non-Vacation Person Trips	Overnight Non-Vacation Person Trips	Total Non-Vacation Person Trips
Grey/Simcoe	16.8%	14.1%	14.8%
Rest of Georgian Lakelands	8.2%	25.7%	21.1%
South-West Ontario	2.9%	5.5%	4.8%
Festival Country	32.1%	9.8%	15.6%
Metro Toronto	13.1%	3.1%	5.7%
Central Ontario	22.2%	23.0%	22.8%
Eastern Ontario	1.0%	5.8%	4.6%
Northern Ontario	0.9%	8.9%	6.8%
Rest of the World	2.8%	4.1%	3.8%
TOTAL	100.0%	100.0%	100.0%

TABLE 48

AVERAGE NUMBER OF NIGHTS AWAY

Origin - Metro Toronto

	Georgian Lakelands Travel Association Area	Province of Ontario
Type of Trip	Average No. Nights Away	Average No. Nights Away
Vacation	7.25	6.73
Non-Vacation	2.27	2.36
Personal	2.45	2.44
Business	2.28	2.13

Source: 1976 Ontario Household Survey.

Visitors to the area from Metro Toronto took longer vacations but shorter weekend/weekday recreational trips than to other destinations in the province. The residents of Metro Toronto spent almost half a day longer on vacations in the area than they did for vacations taken in the rest of the province.

The reason is probably the proximity of Metro Toronto to the area allowing visitors to stay marginally longer because of the reduced driving distance.

The length of weekend/weekday recreational trips taken in the area was slightly less than for similar trips taken in the rest of the province. This however, was balanced by the much higher volume of such trips to the area by comparison with the provincial average.

ii) Ontario

TABLE 49

VOLUME OF DAY AND OVERNIGHT PERSON TRIPS TO

GEORGIAN LAKELANDS AND ONTARIO FROM ONTARIO

1976

Origin	Georgian Lakelands Travel Association Area				Pro	ovince	of Ontari	0
Ontario	Day Tri	ps Ov	ernight Tr	rips	Day Tri	ps (Overnight	Trips
Type of Trip	Person Trips (000's)	96	Person Trips (000's)	0/0	Person Trips (000's)	0/0	Person Trips (000's)	0,0
Vacation	266	11.0	2,160	89.0	813	8.9	8,344	91.1
Non- Vacation	1,194	21.1	4,470	78.9	7,699	35.0	14,270	65.0
Personal	1,659	43.6	2,142	56.4	16,776	54.2	14,202	45.8
Business	329	53.7	284	46.3	2,970	54.2	2,508	45.8
TOTAL	3,448	27.6	9,056	72.4	28,258	41.8	39,324	58.2

Source: 1976 Ontario Household Survey

There were significantly more trips to the area involving an overnight stay than to the province as a whole.

By comparison with the provincial average in the two major categories of trip taking, personal and non-vacation person trips, significantly more trips involved an overnight stay in the area. For the other two categories, vacation and business trips, the distribution of day and overnight trips was very consistent with the provincial average.

Overall, in total person trips, 72% of person trips originating in Ontario to the area involved an overnight stay, whereas for total trips to the province as a whole only 58% did so.

Of trips to the area over one third were weekend/weekday recreational trips involving an overnight stay.

36% of all trips originating in Ontario to the area were non-vacation trips involving an overnight stay. This compares with 21% for similar trips taken by the residents of Ontario to the province as a whole.

TABLE 50

AVERAGE NUMBER OF NIGHTS AWAY

Origin - Onta	ario)
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	Georgian Lakelands Travel Association Area	Province of Ontario
Type of Trip	Average No. Nights Away	Average No. Nights Away
Vacation	7.29	6.62
Non-Vacation	2.29	2.36
Personal	2.32	3.37
Business	2.77	2.78

Source: 1976 Ontario Household Survey

Residents of Ontario who took a vacation in the area during 1976 stayed on average one-half day longer than for similar vacations taken in the rest of the province. Non-vacation person trips to the area were only slightly shorter than those to destinations in the rest of the province.

Personal trips to the area from Ontario as a whole were more than a day shorter than those to the province as a whole.

Business trips in the area were almost the same as the provincial average at just over two and one-half nights. Proximity to Toronto is, therefore, not a significant feature in reducing the length of business trips, as both the number and the length of stay were almost the same as the provincial average.

iii) Other Canadian Provinces

TABLE 51

VOLUME OF PERSON TRIPS TO THE GEORGIAN BAY ECONOMIC REGION FROM CANADIAN PROVINCES OTHER THAN ONTARIO DURING JULY, AUGUST, SEPTEMBER 1978 BY DURATION OF TRIP

Trip Duration	Person Trips (000's)	Per Cent
Day Trip	9	17.3%
Overnight Trip	43	82.7%
TOTAL	52·	100.0%

Source: 1978 3rd Quarter Canadian Travel Survey.

All of the day trip visitation originated in Quebec. Because of the relatively small sample size the above figure should be treated with caution.

Despite what appears to be an overstatement of the number of person trips which did not involve an overnight stay in the area, the distribution of day and overnight trips was similar to that for trips originating in Ontario itself.

iv) U.S. Residents

TABLE 52

VOLUME OF PERSON TRIPS TO THE GEORGIAN LAKELANDS TAA FROM THE U.S. IN 1978 BY DURATION OF TRIP

Trip Duration	Person Trips (000's)	Per Cent
Day Trip	24	11.2%
Overnight Trip	194	88.8%
TOTAL	218	100.0%

Source: 1973-74 U.S. Auto Exit Survey (Extrapolation).

TABLE 53

NUMBER OF NIGHTS SPENT IN GEORGIAN LAKELANDS TAA BY RESIDENTS OF U.S.

	Per Cent
1 Night	9.2%
2 Nights	11.7%
3 Nights	16.8%
4 Nights or more	51.1%
TOTAL	100.0%

Source: 1973-74 U.S. Auto Exit Survey.

89% of all person trips into the area taken by the residents of the U.S. involved an overnight stay. Of these over half (51%) involved a stay of four nights or more. Only 9% were just for the one night.

c) Seasonality

i) Metro Toronto

TABLE 54

VOLUME OF PERSON TRIPS TAKEN BY THE RESIDENTS OF METRO TORONTO BY SEASON 1976

	Grey/Simcoe Counties		Lakel	Georgian Lakelands TAA		Province of Ontario		All Destinations	
Season	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year	
Jan-Mar	321	11.1	581	9.5	1,948	9.6	2,708	11.0	
Apr-June	897	31.2	1,751	28.7	6,243	30.7	7,149	29.1	
July-Sept	1,042	36.2	2,229	36.6	7,582	37.2	9,028	36.7	
Oct-Dec	619	21.5	1,532	25.2	4,579	22.5	5,699	23.2	
Annual	2,879	100.0	6,093	100.0	20,352	100.0	14,579	100.0	

During 1976 as a whole the residents of Metro Toronto took two thirds of their trips to all destinations in the spring and summer months (66%). The pattern was the same for destinations within Ontario.

36% of trips to Grey and Simcoe Counties made by the residents of Metro Toronto in 1976 were in the summer months of July, August and September. 31% were in the spring. Only 11% were in the winter months.

Grey and Simcoe counties were very popular with the residents of Toronto for winter vacations in Ontario.

TABLE 55

VOLUME OF VACATION PERSON TRIPS TAKEN BY
THE RESIDENTS OF METRO TORONTO IN GREY AND
SIMCOE COUNTIES IN 1976 AS A PERCENTAGE OF ALL
VACATION PERSON TRIPS TAKEN BY THE RESIDENTS
OF METRO TORONTO IN THE PROVINCE OF ONTARIO

BY SEASON

Origin - Metro Toronto	Per Cent
Winter (Jan - Mar)	72.2%
Spring (Apr - June)	51.4%
Summer (July - Sept)	8.8%
Fall (Oct - Dec)	22.2%
Annual	20.0%
Fall (Oct - Dec)	22.2%

Source: 1976 Ontario Household Survey.

Almost 3 out of 4 vacation person trips taken by residents of Metro Toronto anywhere in the province of Ontario in the winter of 1976 were taken in Grey and Simcoe Counties. Just over half of vacation person trips taken by residents of Metro Toronto anywhere in the Spring of the same year were taken in Grey and Simcoe Counties.

The percentages of vacation person trips taken by Metro Toronto residents in Grey and Simcoe Counties in the summer and fall were far lower.

TABLE 56

VOLUME OF VACATION PERSON TRIPS TAKEN BY
THE RESIDENTS OF TORONTO IN 1976 BY SEASON

	Grey/Simcoe Counties		Georgian I		Province of Ontario	
Season	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year
Jan-Mar	140	21.7	183	14.1	194	6.0
Apr-June	222	34.4	237	18.3	432	13.4
July-Sept.	178	27.6	473	36.5	2,019	62.8
Oct-Dec.	105	16.3	404	31.1	572	17.8
Annual	645	100.0	1,297	100.0	3,217	100.0

Source: 1976 Ontario Household Survey.

Apart from the fall, the Toronto market behaved very differently to the rest of Ontario when taking vacations in the area.

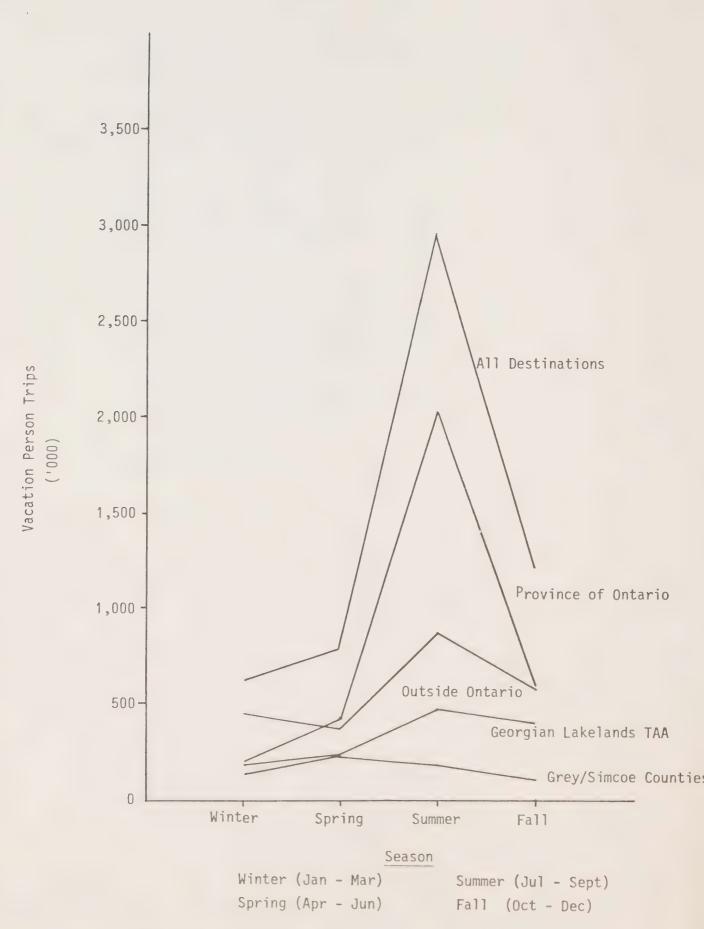
The major difference in 1976 was in the summer months. Only 28% of vacation person trips taken by the resident of Metro Toronto in Grey and Simcoe counties were taken during July, August and September. For the province as a whole 39% of vacation trips to Grey and Simcoe counties were in the summer.

This is best shown graphically. (See Figures 9 and 10).

FIGURE 9

VOLUME OF VACATION PERSON TRIPS TAKEN BY RESIDENTS OF TORONTO

IN 1976



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FIGURE 10

VOLUME OF VACATION PERSON TRIPS TO GREY AND SIMCOE COUNTIES 1976

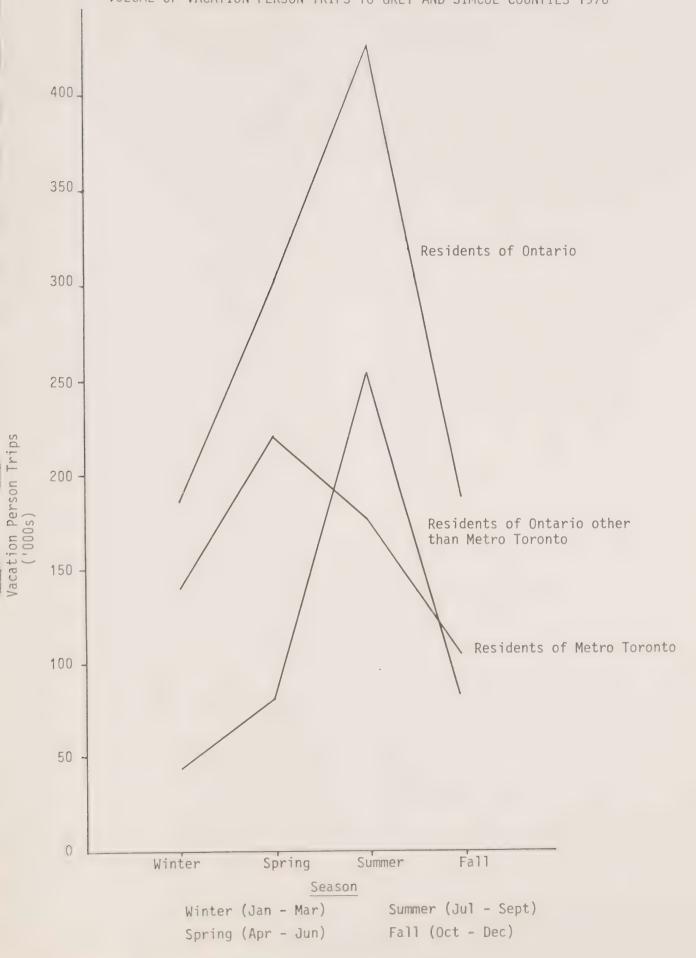


TABLE 57

VOLUME OF NON-VACATION PERSON TRIPS TAKEN BY

RESIDENTS OF METRO TORONTO IN 1976

BY SEASON

Grey/Simcoe Counties			Georgian La TAA	Province of Ontario		
Season	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year
Jan-Mar	132	9.4	288	8.3	801	8.8
Apr-June	533	38.0	1,271	36.9	3,552	38.9
July-Sept	473	33.7	1,187	34.5	3,207	35.1
Oct-Dec	266	18.9	699	20.3	1,569	17.2
Annual	1,404	100.0	3,445	100.0	9,129	100.0

Source: 1976 Ontario Household Survey.

The majority (38%) of Metro Toronto's weekend and weekday recreational trips to Grey and Simcoe counties were taken in the spring rather than the summer. Only 9% of such trips were taken in the winter months. Again this high level of spring travel by Toronto's residents was different to the pattern of the province as a whole.

This is best shown graphically. (See Figure 11).

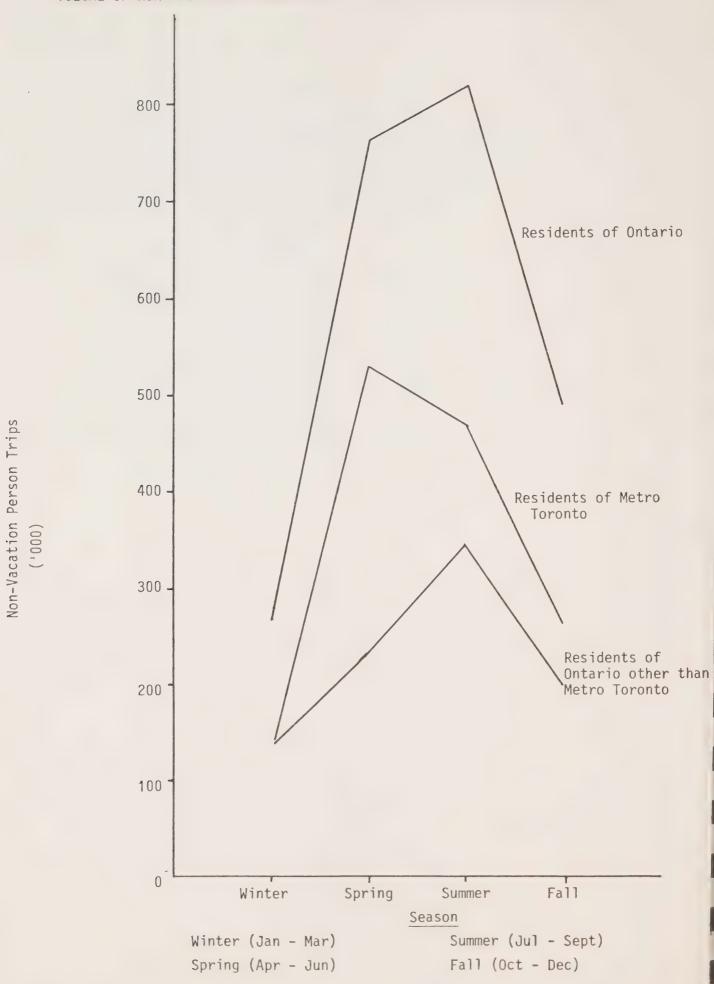
Toronto's dominance of non-vacation recreational trips taken in Grey and Simcoe Counties was steady through the year.

TABLE 58

OF METRO TORONTO IN GREY AND SIMCOE COUNTIES IN 1976

AS A PERCENTAGE OF ALL NON-VACATION PERSON TRIPS TAKEN
IN THE TWO COUNTIES BY RESIDENTS OF ONTARIO BY SEASON

Origin - Metro Toronto	Per Cent
Winter (Jan - Mar)	49.4
Spring (Apr - Jun)	69.4
Summer (Jul - Sept)	57.5
Fall (Oct - Dec)	60.2



Grey and Simcoe counties got 15% of Metro Toronto's non-vacation recreational trip market steadily throughout the year.

TABLE 59

VOLUME OF NON-VACATION PERSON TRIPS TAKEN BY RESIDENTS OF METRO TORONTO IN GREY AND SIMCOE COUNTIES IN 1976 AS A PERCENTAGE OF ALL NON-VACATION PERSON TRIPS TAKEN BY THE RESIDENTS OF METRO TORONTO IN THE PROVINCE OF ONTARIO BY SEASON

Origin - Metro Toronto Per Cen	t
Winter (Jan - Mar) 16.3	
Spring (Apr - Jun) 15.0	
Summer (Jul - Sept) 14.7	
Fall (Oct - Dec) 16.9	
Annual 15.4	

Source: 1976 Ontario Household Survey.

Of all such weekend or weekday recreational person trips into the two counties during 1976, a fairly steady percentage originated in Metro Toronto. In the spring quarter, there was a significantly higher average number of such person trips, almost 70%. For the remainder of the year, the number of Metro Toronto's residents as a percentage of all Ontario's residents taking such trips in the two counties stayed fairly constant. It was 59% in the winter, 57% in the summer and 56% in the fall.

This high spring percentage was probably a function of cottage opening occurring in late May and June.

A more interesting figure was the relatively low penetration of the Toronto market by the two counties. Grey and Simcoe steadily, throughout the year, got 15% to 17% of all Toronto's non-vacation person trips taken in Ontario. This appears very low when compared with the penetration of the Toronto market for vacation person trips into the area, particularly for the first six months of the year.

ii) Ontario

TABLE 60

VOLUME OF PERSON TRIPS TAKEN BY RESIDENTS OF
ONTARIO BY SEASON 1976

Grey/Simcoe Counties			Georgian Lakelands TAA		Province of Ontario		All Destinations	
Season	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year
Jan-Mar	752	12.8	1,344	10.8	8,994	13.3	11,373	13.9
Apr-June	1,713	29.1	3,529	28.2	19,118	28.3	22,564	27.6
July-Sept	2,071	35.2	4,794	38.3	23,526	34.8	28,529	35.0
Oct-Dec	1,343	22.9	2,837	22.7	15,944	23.6	19,154	23.5
Annual	5,879	100.0	12,504	100.0	67,582	100.0	81,720	100.0

Source:

1976 Ontario Household Survey.

The majority (35%) of the residents of Ontario visited Grey and Simcoe counties during the summer months of 1976. Spring and fall accounted for 29% and 23% respectively of the person trips. Only 13% of Ontario's residents visiting Grey and Simcoe counties in 1976 did so in the winter.

TABLE 61

VOLUME OF VACATION PERSON TRIPS TAKEN BY RESIDENTS ON ONTARIO

IN 1976 BY SEASON

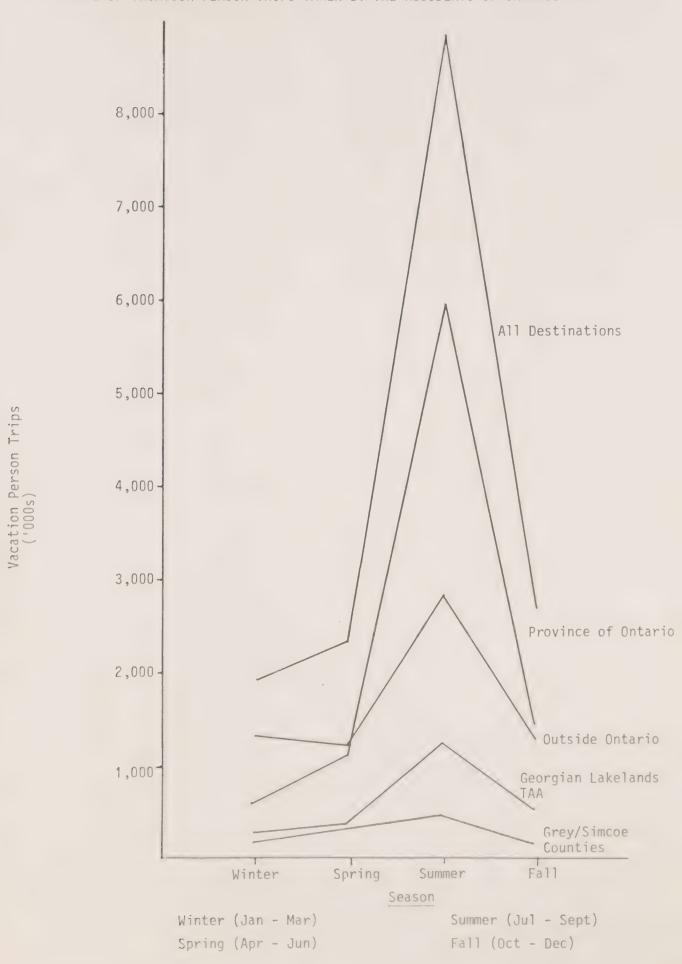
	Grey/S Coun			Lakelands	Provin Onta	
Season	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year	Person Trips (000's)	Per Cent of Year
Jan-Mar	185	16.7	285	11.8	601	6.6
Apr-June	303	27.3	352	14.5	1,168	12.7
July-Sept	433	39.0	1,264	52.1	5,998	65.5
Oct-Dec	188	17.0	525	21.6	1,390	15.2
Annual	1,109	100.0	2,426	100.0	9,157	100.0

Source:

1976 Ontario Household Survey.

FIGURE 12

VOLUME OF VACATION PERSON TRIPS TAKEN BY THE RESIDENTS OF ONTARIO 1976



The pattern of vacation visitation by the residents of Ontario to Grey and Simcoe counties in 1976 did not show the strong peaking in the summer by comparison with vacation visitation to the province as a whole. Only 39% of vacation person trips taken by Ontario's residents in the area occured in the summer by comparison with 66% for vacation person trips in the province as a whole. The other major differences were the relatively high spring and winter vacations taken in the area by comparison with the province as a whole.

iii) Other Canadian Residents

There are very few current reliable data on the seasonality of travel by Canadian residents. There are no reliable data on the seasonality of visitation by other Canadian residents to the region.

However, the 1978 Vacation Travel by Canadians survey published by the CGOT shows that for vacation trips taken in Canada by Canadians, July and August continue to be the dominant months for travel (52%).

TABLE 62

VACATION TRIPS IN CANADA BY CANADIANS IN 1978

Season	Per Cent of Vacation Trips
December to March	11%
April to June	18%
July to August	52%
September to November	19%
TOTAL	100%

It can be assumed that travel to the area by the residents of other Canadian provinces will tend to follow this pattern.

iv) U.S. Residents

In 1974 it was estimated that 68% of the parties of U.S. residents visiting the Georgian Lakelands TAA did so during July and August. 16% and 14% visited the area in the spring and fall respectively. Only 2% did so during the winter months.

It can be assumed that this distribution has been maintained. Consequently two out of three parties visiting the area did so during the summer months.

d) Mode of Transportation

i) Metro Toronto

TABLE 63

VOLUME OF PERSON TRIPS ORIGINATING IN METRO TORONTO

TO GEORGIAN LAKELANDS AND ONTARIO IN 1976

BY PURPOSE OF TRIP AND BY MODE OF TRANSPORT

		Georgian Lake TAA	lands	s Ontario		
Type of Trip	Transportation	Person Trips (000's)	Per Cent	Person Trips (000's)	Per Cent	
Vacation	Automobile	1,253	96.8	3,144	97.7	
	Other	42	3.2	73	2.3	
	Total	1,295	100.0	3,217	100.0	
Non-Vacation	Automobile	3,415	99.2	8,749	95.8	
	Other	29	0.8	380	4.2	
	Total	3,444	100.0	9,129	100.0	
Personal	Automobile	1,071	97.2	6,262	93.1	
	Other	31	2.8	464	6.9	
	Total	1,102	100.0	6,726	100.0	
Business	Automobile	245	97.2	1,101	86.0	
	Other	7	2.8	179	14.0	
	Total	252	100.0	1,280	100.0	
Total	Automobile	5,984	98.2	19,256	94.6	
	Other	109	1.8	1,096	5.4	
	Total	6,093	100.0	20,352	100.0	

1976 Ontario Household Survey.

Source:

Travel to the area is totally dominated by use of the automobile. In 1976, 98% of all person trips to the area from Metro Toronto made use of an automobile. Significantly the highest percentage usage was for weekend and weekday recreational trips.

Apart from vacation trips, use of the automobile to travel to the area was higher than to the province as a whole.

ii) Ontario

TABLE 64

VOLUME OF PERSON TRIPS ORIGINATING IN ONTARIO TO GEORGIAN LAKELANDS TAA AND ONTARIO IN 1976 BY PURPOSE OF TRIP AND BY MODE OF TRANSPORT

		Georgian Lakelands TAA		Ontario	
Type of Trip	Transportation	Person Trips (000's)	Per Cent	Person Trips (000's)	Per Cent
Vacation	Automobile	2,368	97.6	8,879	97.0
	Other	58	2.4	278	3.0
	Total	2,426	100.0	9,157	100.0
Non-Vacation	Automobile	5,598	98.1	21,066	96.9
	Other	66	1.2	903	4.1
	Total	5,664	100.0	21,969	100.0
Personal	Automobile	3,727	98.1	29,514	95.3
	Other	74	1.9	1,464	4.7
	Total	3,801	100.0	30,978	100.0
Business	Automobile	602	98.2	4,849	88.5
	Other	11	1.8	629	11.5
	Total	613	100.0	5,478	100.0
Total	Automobile	12,295	98.3	64,308	95.2
	Other	209	1.7	3,274	4.8
	Total	12,504	100.0	67,582	100.0

98% of trips to the area made by the residents of Ontario in 1976 involved the use of an automobile. This was the case for all types of trips. The use of other modes of transport to travel to the area was lower than for destinations in other parts of the province.

Travel by the residents of Ontario within their own province is completely dominated by the automobile. For all types of trips, other than business trips, 96% of trips involved the use of an automobile.

iii) Other Canadian Residents

TABLE 65

VOLUME OF PERSON TRIPS TO GEORGIAN BAY ECONOMIC REGION FROM CANADIAN PROVINCES OTHER THAN ONTARIO DURING JULY, AUGUST, SEPTEMBER 1978 BY MODE OF TRANSPORTATION

	Person Trips (000's)	Per Cent
Auto	45	87.0
Air	6	11.6
Bus	ab	-
Rail	1	1.4
Boat	-	-
Other	· -	-
Total	52	100.0

Source: 1978 3rd Quarter Canadian Travel Survey.

In the summer of 1978, 87% of trips to the region from the rest of Canada involved the use of an automobile. This is largely a reflection of the high percentage of visitors from Quebec who travelled to the region by automobile. The number of person trips involving the use of air transportation is very consistent with the number of trips from the Atlantic and western provinces.

iv) U.S. Residents

There are no current reliable data on mode of transportation of U.S. residents to the area. The 1973-74 survey of U.S. visitation to the province of Ontario was an auto exit survey and therefore only assessed this mode of transportation. However, in 1978 the mode of transportation used by U.S. residents to Ontario was as follows:

MODE OF TRANSPORTATION TO THE PROVINCE OF ONTARIO
BY U.S. RESIDENTS STAYING ONE NIGHT OR MORE IN 1978

Automobile 77.5%	
Air 10.5	
Bus 6.0	
Boat 2.7	
Rail 0.3	
Other 3.0	
Total 100.0	

Source: 1978 Statistics Canada Catalogue, 66-201 Annual Tables 11 and 21.

Use of the automobile was dominant, although use of buses was of significance.

Our assessment would be that the vast majority of U.S. visitors to the area would use the automobile as their mode of transport, with a small number using buses. The percentage of boats as a mode of transport appears fairly high due to the attraction of the 30,000 Islands as a cruising destination.

e) Type of Accommodation

i) Metro Toronto

TABLE 67

TYPE OF ACCOMMODATION USED ON ALL PERSON TRIPS

BY RESIDENTS OF METRO TORONTO

	Georgian Lakelands TAA		Province of Or	ntario
Type of Accommodation	Person Trips (000's)	Per Cent	Person Trips (000's)	Per Cent
Home of Friends	928	19.1	3,960	28.8
Private Cottage	3,365	69.5	6,113	44.5
Hotel/Motor Hotel	64	1.3	740	5.4
Motel	66	1.4	667	4.9
Campground	222	4.6	1,569	11.4
Commercial Cottage	51	1.0	150	1.1
Resort Lodge	43	0.9	252	1.8
Outfitter/Outpost	-	-	18	0.1
Other	105	2.2	274	2.0
TOTAL	4,844	100.0	13,743	100.0

Source: 1976 Ontario Household Survey.

The majority of visitors stay in private cottages. Seventy per cent of all trips to the area made by the residents of Metro Toronto in 1976 involved the use of a private cottage for their overnight accommodation. A further 19% of the trips involved the use of the homes of friends and relatives for overnight accommodation.

Commercial accommodation, that is hotels, motor hotels, motels, resort lodges and commercial cottages were used very little. Under five per cent of person trips to the area involved the use of such accommodation.

TABLE 68

TYPE OF ACCOMMODATION USED FOR VACATION PERSON TRIPS
IN THE AREA BY THE RESIDENTS OF METRO TORONTO IN 1976

	Georgian Lakelands TAA		Province of C	ntario
Type of Accommodation	Person Trips (000's)	Per Cent	Person Trips (000's)	Per Cent
Home of Friends	154	13.2	369	12.4
Private Cottage	864	74.3	1,632	54.7
Hotel/Motor Hotel	•	-	78	2.6
Motel	19	1.6	236	7.9
Campground	89	7.7	500	16.8
Commercial Cottage	-	-	4	0.1
Resort Lodge	16	1.4	122	4.1
Outfitter/Outpost	-	-	6	0.2
Other	21	1.8	36	1.2
TOTAL	1,163	100.0	2,983	100.0

Source: 1976 Ontario Household Survey.

TABLE 69

TYPE OF ACCOMMODATION USED FOR NON-VACATION PERSON

TRIPS IN THE AREA BY THE RESIDENTS OF METRO TORONTO IN 1976

	Georgian Lake	elands	Province of Or	itario
Type of Accommodation	Person Trips (000's)	Per Cent	Person Trips (000's)	Per Cent
Home of Friends	226	8.0	755	11.2
Private Cottage	2,313	81.9	4,052	60.2
Hotel/Motor Hotel	16	0.6	299	4.4
Motel	24	0.8	239	3.6
Campground	133	4.7	1,051	15.6
Commercial Cottage	33	1.2	120	1.8
Resort Lodge	27	0.9	68	1.0
Outfitter/Outpost	-	50	6	0.1
Other	53	1.9	142	2.1
TOTAL	2,825	100.0	6,732 10	0.00

For vacation and weekend/weekday recreational trips the use of private cottages was even more dominant.

Of the vacation person trips taken in the area by the residents of Metro Toronto 74% involved the use of a private cottage for overnight accommodation. For weekend and weekday recreational person trips this percentage was even higher with 82% of Metro Toronto's residents making use of a private cottage for overnight accommodation.

53% of all vacation person trips and 57% of all weekend/weekday recreational person trips taken in Ontario by the residents of Metro Toronto which involved the use of a private cottage for overnight accommodation were taken in the Georgian Lakelands TAA.

Thus over half the 'cottaging' which occurred in Ontario by the residents of Metro Toronto occurred in this area of the province.

ii) Ontario

TABLE 70

TYPE OF ACCOMMODATION USED ON ALL PERSON TRIPS

BY RESIDENTS OF ONTARIO

	Georgian Lake	elands	Province of Ont	ario
Type of Accommodation	Person Trips (000's)	Per Cent	Person Trips (000's)	Per Cent
Home of Friends	2,342	25.9	14,745	40.0
Private Cottage	4,853	53.5	10,958	27.9
Hotel/Motor Hotel	221	2.4	2,965	7.5
Motel	291	3.2	2,318	5.9
Campground	694	7.7	4,813	12.2
Commercial Cottage	133	1.5	428	1.1
Resort Lodge	171	1.9	539	1.4
Outfitter/Outpost	7	0.1	65	0.2
Other	344	3.8	1,493	3.8
TOTAL	9,056	100.0	39,324 1	00.0

The majority of visitors stay in private cottages.

In 1976 for all trips to the area one half of the visitors from Ontario stayed in private cottages. The 1978 data complements this figure. Of residents of Ontario taking trips into the Georgian Bay Economic region during July, August and September 53% stayed in private cottages.

This is a striking contrast with the overall provincial figure as only 28% of all person trips in the province in 1976 made use of private cottages.

For vacation and weekend/weekday recreational trips the use of private cottages was even more dominant.

Of vacation person trips taken in the Georgian Lakelands area by the residents of Ontario 60% involved the use of a private cottage.

TABLE 71

TYPE OF ACCOMMODATION USED FOR VACATION TRIPS
IN THE AREA BY THE RESIDENTS OF ONTARIO IN 1976

	Georgian Lakelands TAA		Province of On	tario
Type of Accommodation	Person Trips (000's)	Per Cent	Person Trips (000's)	Per Cent
Home of Friends	253	11.7	1,337	16.0
Private Cottage	1,306	60.5	2,971	35.6
Hotel/Motor Hotel	30	1.4	417	5.0
Motel	154	7.1	838	10.0
Campground	267	14.4	1,991	23.9
Commercial Cottage	24	1.1	186	2.2
Resort Lodge	71	3.3	265	3.2
Outfitter/Outpost	-	000	23	0.3
Other	55	2.5	316	3.8
TOTAL	2,160	100.0	8,344	100.0

TABLE 72

TYPE OF ACCOMMODATION USED FOR NON-VACATION PERSON

TRIPS IN THE AREA BY THE RESIDENTS OF ONTARIO

IN 1976

	Georgian Lakelands TAA		Province of Ontario
Type of Accommodation	Person Trips (000's)	Per Cent	Person Trips Per (000's) Cent
Home of Friends	459	10.3	2,305 16.2
Private Cottage	3,168	70.9	7,084 49.6
Hotel/Motor Hotel	59	1.3	759 5.3
Motel	75	1.7	613 4.3
Campground	416	9.3	2,068 18.3
Commercial Cottage	70	1.6	201 1.4
Resort Lodge	100	2.2	176 1.2
Outfitter/Outpost	7	0.1	21 0.2
Other	116	2.6	503 3.5

Source: 1976 Ontario Household Survey.

For weekend/weekday recreational trips the percentage is even higher, with 71% of the person trips making use of private cottages for overnight accommodation.

Commercial accommodation was relatively little used.

Of all person trips into the area taken by the residents of Ontario in 1976 only 9% involved the use of commercial roofed accommodation. The average for trips to the province as whole was 16%.

Campgrounds, although popular, were not as popular as in the rest of the province.

In 1976 26% of vacation person trips and 25% of non-vacation person trips taken in Ontario by the residents of Ontario were taken in the Georgian Lakelands TAA. However, only 13% of vacation person trips taken in Ontario which involved campgrounds and 16% of non-vacation person trips taken in Ontario which involved campgrounds were taken in the area. Although campgrounds were the second most popular type of overnight accommodation for vacation trips taken in the area by the residents of Ontario, the area does not appear to be getting its share of the camping market.

iii) Other Canadian Residents

TABLE 73

VOLUME OF PERSON TRIPS TO THE GEORGIAN BAY ECONOMIC REGION FROM CANADIAN PROVINCES OTHER THAN ONTARIO DURING JULY, AUGUST, SEPTEMBER 1978 BY TYPE OF ACCOMMODATION

	Person Trips (000's)	Per Cent
Hotel	4	9.0
Motel	6	14.7
Commercial Cottage	4	10.2
Private Cottage	19	43.3
Camping/Trailer Park	3	6.7
Home of Friends/Relatives	7	16.1
Other	es .	
Total	43	100.0

Source: 1978 3rd Quarter Canadian Travel Survey.

During the summer of 1978 visitors to the region from Canadian provinces other than Ontario made much higher useage of commercial accommodation in the region than did the residents of Ontario. 34% of person trips to the region involving an overnight stay made use of commercial accommodation.

The use of private cottages was still dominant with about half of the person trips making use of such accommodation. Seven per cent of the person trips made use of campgrounds for overnight accommodation. This is consistent with the usage of campgrounds in the region by the residents of Ontario.

iv) U.S. Residents

TABLE 74

VOLUME OF PERSON TRIPS TO THE GEORGIAN LAKELANDS TAA

FROM THE U.S. DURING 1978 BY TYPE OF ACCOMMODATION

	Person Trips (000's)	Per Cent
Hotel/Motel	22	11.2%
Commercial Cottage	14	7.3%
Private Cottage	78	40.0%
Camping/Trailer Park	12	6.1%
Home of Friends/Relatives	48	24.9%
Other	20	10.5%
Total	194	100.0%

Source: 1973-74 U.S. Auto Exit Survey (Extrapolation).

Forty per cent of U.S. residents visiting the area made use of their private cottage for overnight accommodation when visiting the Georgian Lakelands area. A further 25% stayed with friends and relatives. Only 11% made use of hotels or motels in the area, although 17% made use of commercial cottages, resort lodges and hostels/outfitters (these latter two categories comprising 'other').

Thus, even amongst U.S. visitors usage of private cottages was high. This bodes well for the future because the use of a private cottage implies a strong committment and thus a strong likelihood of continued visitation by this segment to the area.

5.3 Markets, Market Penetration and Short Term Forecasts

5.3.1 Introduction

This section provides quantitative and qualifative data on the tourism markets for the study area.

Short term market forecasts are provided for each market segment for the years 1980 to 1984. The forecasts are based primarily on trend extrapolations and reflect the type of demand that is most likely to occur. Exceptional promotion or sudden socio-economic changes could create major discontinuities in current trends. However, the likelihood of such occurrences drastically changing the overall short term forecast is slight.

Due to data limitations it is impossible to accurately identify the current level of tourism demand. We estimate it to be between 5.9 and 6.5 million person trips in 1980. Our five year projections show demand growing to between 6.4 and 7.0 million person trips per year. These projections represent average annual growth rates of about 2%. Table 75 contains our short-term forecasts.

Following sections describe the market segment, identify the study area's level of market penetration and provide the basis for our short term forecasts.

5.3.2 Market Segments Considered

The market analysis considered the following geographic market segments:

- Ontario residents;
- other Canadians;
- U.S. residents;
- other international.

TABLE 75

MARKET FORECAST - PERSON TRIPS (,000) TO STUDY AREA

MARKET		1980	1981	1982	1983	1984
Ontario Residents	Н	6,293.3	6,416.6	6,528.5	6,634.7	6,754.4
	L	5,733.9	5,846.3	6,020.7	6,118.6	6,229.1
Other Canadians	Н	25.2	26.2	27.3	28.3	29.5
	L	23.4	23.9	24.4	24.8	25 .3
U.S. Residents	Н	144.3	140.6	137.5	134.1	131.0
	L	109.6	108.1	106.6	105.1	103.4
Other International	Н	25.5	28.9	32.6	36.8	41.6
	L	17.7	19.2	20.8	22.6	24.5
TOTAL	Н	6,488.3	6,612.3	6,725.9	6,833.9	6,956.5
	L	5,884.6	5,997.5	6,172.5	6,271.1	6,382.3

In addition, Ontario residents have been further segmented to identify the Metro Toronto market separately.

Due to a high occurrence of second homes, such as cottages, in the study area we have also identified this segment of visitors. Traditionally such visitors behave more like local residents than tourists. As such their demands for facilities are somewhat different from those of other tourists.

5.3.3 Ontario Residents

There are four main sources of data on Ontario residents' travel.

These are:

- Ontario's 1976 household survey;
- Statistics Canada, Travel Between Canada and Other Countries, Cat. 66-201
- Statistics Canada, 2nd Quarter 1977, Domestic Travel Survey. Cat. 80-001;
- Statistics Canada, 3rd Quarter 1978, Domestic Travel Survey, Cat. 87-001.

Unfortunately the trip definitions used in these surveys varies from survey to survey. Table 76 indicates the discrepancies between these various surveys.

TABLE 76

ESTIMATED PERSON TRIPS BY ONTARIO RESIDENTS

	Trip	No. of Person T	rips Estimated	by Destination
Survey	<u>Def'n.</u>	<u>Ontto-World</u> (,000)		<u>Ontto-Ont.</u> (,000)
1976 Household	25 mi	81,720	73,466	67,582
1977 2nd Quarter ⁽¹⁾	50 mi	49,307 ⁽²⁾	33,852	32,211
1978 3rd Quarter ⁽¹⁾	50 mi	57,861 ⁽²⁾	41,309	35,834

Notes:

- (1) Adjusted to full year estimate -- 2nd Quarter assumed to be 27% of full year and 3rd Quarter 35%.
- (2) Travel outside Canada taken from Statistics Canada. Travel between Canada and Other Countries, Cat. 66-201.

The 1976 Household Survey data is difficult to reconcile to Statistics Canada who consistently estimate about 14 000 person trips by Ontario residents outside of Canada. If the indicated Ontario-to-Canada figure were for Ontario-to-Canada then this data would be consistent with Statistics Canada international travel data.

We have been unable to obtain reliable data on the percentage change in number of trips recorded as the trip length definition is changed. Some data from U.S. surveys indicates that the number of trips double as the trip length is halted. If this is so then the various estimates provided by these surveys appear to be reasonably consistent.

Table 77 contains market penetration data for the study area. It is based on the 1976 Household Survey.

PENETRATION OF ONTARIO RESIDENT MARKET BY THE STUDY AREA

TABLE 77

Origin - Destination	Number of Person Trips (000's)	Market Penetrationby Study Area
Ontario to all destinations	81,720	0.07195
Ontario to Canada	73,466	0.08000
Ontario to Ontario	67,582	0.08700
Ontario to Study Area	5,879	

For estimating purposes we have assumed that 81 720 000 person trips is a reasonable estimate of the total number of trips taken by Ontario residents in 1976.

As there is insufficient data to forecast future trip taking from past actuals we have used an alternative forecasting methodology based on population data and disposable personal income.

Ontario's population in 1976 was 8,342,300. These people took 81,720,000 person trips. Hence the average number of trips per capita was 9.80.

The per capita disposable income in constant 1971 dollars for 1976 was \$4,001.

We have assumed that there is a close stable relationship between personal disposable income and propensity to travel. Several studies support such an assumption. We have also assumed that the shape of this propensity-to-travel curve for Ontario would not be very different from that for other segments of the Canadian population. This is an unsupported assumption. However, given the existing data limitations, it is necessary to make assumptions. We do not anticipate that this assumption will unduly distort the resulting forecast.

Given the above assumption we have drawn a propensity-to-travel curve for Ontario residents using our 1976 data to fix the curve and reliable data on travel from other provinces to establish the shape of the curve. Figure 13 is the propensity-to-travel curve we obtained.

Using forecasts of per capita disposable income and Ontario population for the years 1980 to 1989 we obtained estimates of total person trips by Ontario residents from this graph. Estimates of travel to the study area were then obtained by taking 7.2% of total person trips. This figure was obtained from the 1976 household survey data.

Table 78 contains the forecasts provided by this approach. We have used this forecast as a high forecast.

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PERSONNAL DISPOSABLE INCOME (,000) PER CAPITA (CONSTANT 1971 DOLLARS)

Figure 13
ESTIMATED PROPENSITY TO TRAVEL CURVE FOR ONTARIO

TABLE 78

HIGH FORECAST OF PERSON TRIPS BY ONTARIO RESIDENTS

TO STUDY AREA

<u>Year</u>	Per Capita Disposable Income (1)	Person Trips Per Capita ⁽²⁾	Population ⁽³⁾	Total Person Trips ⁽⁴⁾	Person Trips to Study Area ⁽⁵⁾
1976	4,001	9.80	8,342.3	81,754.5	5,886.3
1977	4,082	9.80	8,460.9	82,916.8	5,970.0
1978	4,079	9.85	8,581.8	84,101.6	6,055.3
1979	4,156	9.90	8,704.5	85,739.3	6,173.2
1980	4,290	9.95	8,829.0	87,407.1	6,293.3
1981	4,370	9.98	8,956.7	89,119.1	6,416.6
1982	4,440	10.00	9,085.5	90,673.2	6,528.5
1983	4,500	10.04	9,214.8	92,148.0	6,634.7
1984	4,570	10.05	9,343.8	93,811.7	6,754.4

Notes:

- (1) Per capita disposable income in constant 1971 dollars. Actuals 1976 to 1979, estimates 1980 to 1984.
- (2) 1976 based on estimated 1976 population and total person trips from 1976 Household Survey. Figures for other years taken from graph.
- (3) Taken from Ontario Economic Council estimates.
- (4) Calculated from population and person trips per capita estimates.
- (5) Calculated as 7.2% of total person trips.

A low forecast for Ontario resident travel to the study area was obtained as follows:

- starting with the previously estimated total person trips we subtracted the Statistics Canada estimates for foreign travel for the years 1976 to 1979, to provide estimates for Ontario travel in Canada.
- Ontario travel in Canada was then calculated as a percentage of total travel. The percentage obtained is remarkably consistent. A check for the years 1971 to 1975 provided a range of values for this percentage during the years 1971 to 1979 of from 80% to 83%.
- this percentage was then estimated for the years 1980 to 1984 and the corresponding Canadian travel by Ontario residents estimated. An estimate of the travel to the study area was then made based on data from the 1976 Household Survey.

Table 79 contains the results of this Low Forecast.

TABLE 79

LOW FORECAST OF PERSON TRIPS BY ONTARIO RESIDENTS

TO STUDY AREA

Year	Total Estimated Person Trips (1)		Person Trips In Canada ⁽³⁾	% in Canada ⁽⁴⁾	Person Trips to Study Area ⁽⁵⁾
1976	81,754.5	14,491.2	67,263.3	82	5,381.1
1977	82,916.8	15,455.1	67,461.7	81	5,396.9
1978	84,101.6	16,552.0	67,549.6	80	5,404.0
1979	85,739.3	15,221.7	70,517.6	82	5,641.4
1980	87,407.1		71,673.8	82	5,733.9
1981	89,119.1		73,077.6	82	5,846.3
1982	90,673.2		75,258.7	83	6,020.7
1983	92,148.0		76,482.8	83	6,118.6
1984	93,811.7		77,863.7	83	6,229.1

Notes:

- (1) Data from propensity-to-travel graph.
- (2) Statistics Canada, Cat. 66-201.
- (3) Calculated from previous columns for 1976 to 1979 and from estimated percentage for other years.
- (4) Calculated from previous columns for 1976 to 1979 and estimated for 1980 to 1984.
- (5) Calculated as 8% of total person trips in Canada.
- a) The Metropolitan Toronto Sub Market

Table 80 indicates the importance of Metropolitan Toronto sub market.

TABLE 80

PENETRATION OF METROPOLITAN TORONTO SUB MARKET1)

Origin - Destination	(,000)	Per Cent of Ontario Residents Person Trips	Per Cent of Metro Residents Person Trips
Metro to all destinations	24,579	30.1%	100.0%
Metro to Canada	22,100 ⁽²⁾	30.1%	89.9%
Metro to Ontario	20,352	30.1%	82.8%
Metro to Study Area	2,879	49.0%	11.7%

Notes: 1) Based on 1976 Household Survey data.

2) Estimated by Stevenson & Kellogg.

This sub market accounts for about 33% of the Ontario population and 30.1% of the Ontario resident person trips. Due to its proximity to the study area, it is the major single geographical sub market, providing 49% of all trips by Ontario residents to the study area. This segment is even larger - 59% - if business and personal trips are exluded from the analysis.

The Georgian Lakelands Travel Association Area, which contains the study area, received 6,093,000 (25%) person trips from Metropolitan Toronto during 1976. As the study area is the closest portion of this travel association area to Toronto, it could obtain an increasingly larger share of this market if energy costs soar or gasoline becomes rationed.

Metro Toronto and surrounding areas offer the best opportunity for increased market penetration. Increasing market share in large, well developed tourism markets is extremely difficult unless the product offered is very competitive or there are favourable extenuating circumstances such as gasoline shortages elsewhere. Increased market penetration through promotion without an improved product is simply not feasible for the study area as a whole.

If the study area could increase its penetration of this market from 11.9% of person trips to 12.9% - i.e., a one percent improvement - then it would achieve a four percent increase in person trips from Ontario residents.

b) The Local and Cottage Sub Markets

Table 81 contains population and economic data for the study area. The study area includes the eastern one third of Grey County, the northern two thirds of Simcoe County and the south western tip of Muskoka County. All the urban communities indicated are in the study area. The study area has a high rural population. The per capita disposable income for parts of the area is lower than the provincial average and considerably lower than Metropolitan Toronto. Both of these factors indicate a weak local tourism market.

The Statistics Canada 1978 third quarter Canadian Travel Survey estimated 235 722 person trips of greater than 50 miles within the Georgian Bay Economic Region. This area includes the study area and has a total population of about twice that estimated for the study area. Assuming that half these person trips were taken by residents of the study area and that the third quarter accounts for 35% of all trips in a year then we can estimate that this local market accounts for at most 336 700 person trips per year. This is only about five percent of person trips by Ontario residents to the study area.

TABLE 81

ESTIMATED POPULATION AND ECONOMIC DATA FOR STUDY AREA 1)

Community	Population June 1/79 (,000)	Percent of Study Area	Percent Changes 1976/79		Percent of Study Area	Income 1979
2)						\$
Barrie ²⁾	55.2	28.6	+12.1	16.0	21.0	7,247
Midland	11.8	6.1	+ 2.0	3.8	5.0	6,715
Orillia	24.4	12.6	0.0	7.7	10.1	6,601
Collingwood	11.7	6.0	5.3	3.7	5.0	6,700 ³⁾
Rest of Simco & Grey Coun & Townships Study Area	ties in	46.6	6.0	44.9	59.0	5,788
Metro						
Toronto	2,891.3		+3.1	909.5		8,777
Ontario	8,506.0		+2.9	2,634.6		7,927
Estimate for Study Area	193.2	100.0	+5.9	76.1	100.0	6,300 ³⁾

Notes:

- 1) Source: Statistics Canada and Financial Post Survey of Markets (1980).
- 2) City of Barrie and Innisfil Township
- 3) Thorne Stevenson & Kellogg Estimate. Owen Sound is the municipality for which data is available. Per capita disposable income for Owen Sound is \$6,773.

There are about 19,000 cottages in the study area. The Ontario Recreation Survey 1973 - 74 found that the average party size of those using cottages was 4.4 persons. Hence, cottages could contribute as much as an additional 85,800 persons to the study area during a busy summer weekend.

Cottage owners, their families and friends tend to provide a fairly stable market for local entertainment and recreation.

facilities. In total they contributed between 2.2 million and 2.4 million person trips by Ontario residents to the study area during 1979. This is about 39% of all person trips by Ontario residents to the study area.

5.3.4 Other Canadians

There is only limited data available on travel by other Canadians to the study area. The main source of data is Statistics Canada's Domestic Travel Surveys.

The 1977 second quarter survey estimated 1,980 person trips from Quebec and 1,760 person trips from the rest of Canada - excluding Ontario and Quebec - to the Georgian Bay Economic Region. Assuming that 20% of all trips occurred during the second quarter - as indicated by a 1974 Statistics Canada study - then this is equivalent to 9,900 person trips per year from Quebec and 8,800 from the rest of Canada, excluding Quebec and Ontario.

The 1978 third quarter survey estimated 46,700 person trips from Quebec and 4 870 person trips from the rest of Canada. Assuming that 45% of all trips occur during the third quarter -- as indicated by a 1974 Statistics Canada Study -- then this is equivalent to 103,800 person trips per year from Quebec and 10,800 from the rest of Canda. However, it is extremely doubtful that the Quebec visitation recorded during the third quarter of 1978 is representative of 45% annual Quebec visitation to this region. We believe a more reasonable estimate would be the sum of the third quarter estimates plus 55% of the estimated 1977 annual figure. This approach provides an estimate of annual visitation for 1978 from Quebec of 52,100 person trips.

For planning we have estimated that between 60,900 and 62,900 person trips were made during 1978 to the Georgian Bay Economic Region from provinces other than Ontario.

The 1976 Household Survey of Ontario residents indicates that about 37% of Ontario resident's visitor trips to the Georgian Bay Economic Region were made to the study area. If this ratio holds for other Canadians then we estimate that between 22,500 and 23,300 other Canadian visited the study area in 1978.

Assuming a growth rate for the low forecast of 2% and a growth rate for the high forecast of 4% we obtain the forecasts contained in Table 82.

TABLE 82

FORECASTS OF VISITATION TO STUDY AREA FROM

OTHER CANADIAN PROVINCES

<u>Year</u>	Low Forecast (2% growth) (000's)	High Forecast (4% growth) (000's)
1978	22.5	23.3
1979	23.0	24.2
1980	23.4	25.2
1981	23.9	26.2
1982	24.4	27.3
1983	24.8	28.3
1984	25.3	29.5

Current trends indicate average annual growth rates for interprovincial travel of about 6%. The low projected average annual growth rate for the study area is due to a perceived competitive disadvantage in terms of the availability of natural resources and tourism facilities. However, even if the forecast proves to be significantly low it will have no major impact on the overall forecast due to the predominance of trips by Ontario residents.

5.3.5 U.S. Residents

The forecasts for visitation by U.S. residents are based on data from two sources namely:

- Ontario Government, U.S. Auto Exit Survey, 1973/1974.
- Statistics Canada, Travel Between Canada and Other Countries. Cat. 66-201.

A high forecast was obtained as follows:

- U.S. day and overnight visitors to Ontario were forecasted separately by linear extrapolation from data published by Statistics Canada.
- Estimates of day and overnight visitors to the study area were calculated using data from the U.S. Auto Exit Survey. This survey indicated that 0.2% of day and 4.1% of overnight U.S. persons trips visited the Geogian Lakelands Travel Area. We have assumed that the portion of U.S. person trips to the study area is the same as for Ontario residents, i.e., 47% of Georgian Lakelands Travel Area person trips.

The above calculations are summarized in Table 83.

A low forecast was obtained by starting with an estimate for 1973 visitation to the study area of 121,000 person trips. This was obtained from the U.S. auto exit survey data, again assuming 47% to the study area. This starting estimate was then extrapolated at - 1.4% per year. The 1.4% is the slope of the least square regression line from the previous forecast.

Table 84 contains the results of this low forecast.

TABLE 83
HIGH FORECAST OF U.S. VISITATION TO STUDY AREA

	U.S. Trips to Ontario		U.S. Person	Trips to St	udy Area	
<u>Year</u>	1 day	1 day	Total	1 day	1 day	Total
1971	14,685	8,012	22,697	13.8	154.4	168.2
1972	14,512	7,921	22,433	13.6	152.6	166.2
1973	15,074	8,224	23,198	14.2	158.5	172.7
1974	14,714	8,071	22,785	13.8	155.5	169.3
1975	14,616	7,760	22,376	13.7	149.5	163.2
1976	13,532	7,223	20,755	12.7	139.2	151.9
1977	13,465	7,234	20,699	12.7	139.4	152.1
1978	13,465	7,168	20,633	12.7	138.1	150.8
1979	13,346	7,092	20,438	12.5	136.7	149.2
1980	13,090	6,850	19,940	12.3	132.0	144.3
1981	12,860	6,670	19,530	12.1	128.5	140.6
1982	12,650	6,520	19,170	11.9	125.6	137.5
1983	12,440	6,350	18,790	11.7	122.4	134.1
1984	12,210	6,200	18,410	11.5	119.5	131.0

TABLE 84

LOW FORECAST OF U.S. VISITATION TO STUDY AREA

	T + 3 + 1 C - D - T -
	Total U.S. Person Trips
	To Study Area (,000)
1973	121.0
1974	119.3
1975	117.6
1976	116.0
1977	114.4
1978	112.8
1979	111.2
1980	109.6
1981	108.1
1982	106.6
1983	105.1
1984	103.4

5.3.6 Other International

An analysis of Statistics Canada data for non-U.S. visitors to Ontario indicate an average annual growth rate between 1973 and 1979 of about 10%. The growth rate was about 8½% during the earlier years but it increased to 14% by 1978 and then 27% in 1979. For planning purposes we have taken a conservative 8½% average annual growth rate to obtain a low forecast and a moderate 13% average annual growth rate for a high forecast.

There is next to no data available on visitation by non-U.S. international visitors to the study area. A 1978 visitor's survey at Ste. Marie Among the Hurons indicated that 13% of visitors were other international. This implies an annual visitation of about 17,500 from this category. Provincial parks survey data for the study area indicate day use of 13,700 and overnight of 700 for 1977. These figures are relatively consistent and would indicate that between 15,000 and 20,000 persons visited the study area in 1978. We have used these figures as our base for forecasting future visitation.

Table 85 contains the forecasts derived from the above estimates.

TABLE 85

FORECAST OF NON-U.S. INTERNATIONAL VISITATION

TO STUDY AREA

Annual Person Trips to Study Area

High Forecast (13%) Low Forecast $(8\frac{1}{2}\frac{9}{9})$ (000's)(0001s)20.0 1978 15.0 1979 16.3 22.6 25.5 1980 17.7 19.2 28.9 1981 20.8 32.6 1982 22.6 36.8 1983 24.5 41.6 1984

5.3.7 Tourism Expenditures

Tourism expenditures generate a multiple of direct expenditures to produce tourism related income. Tourism expenditures and income within the study area for 1976 and 1979 are presented below in tables 86 and 87.

TABLE 86

TOURISM EXPENDITURE AND INCOME

WITHIN THE STUDY AREA IN 1976

Origin	Person Trips (000's)	Expenditure/ Person Trip	Expenditure (\$000)	Income (\$000)
Ontario	5,879.0	\$ 30.11	\$177,016.7	\$207,109.5
U.S.A.	134.0	35.63	4,774.4	5,586.0
Other Canada	21.5	40.00	860.0	1,006.2
International	15.0	50.00	750.0	877.5
TOTAL	6,049.5	\$ 30.32	\$183,401.1	\$214,579.2

The above table is based on the following data and assumptions:

- In 1976, 14,791,000 person trips were made by residents of Ontario to the Georgian Bay Economic Region. This resulted in expenditures of \$445,411,000 (1976 Ontario Household Survey). This gives a figure of \$30.11 per person trip for the region.
- In 1976, 20,853,000 person trips were made by residents of the U.S.A. to the Province of Ontario. This resulted in expenditures of \$743,000,000 (Ontario Tourism Statistical Handbook Table 2.1, p.13). This gives a figure of \$35.63 per person trip.

- In 1976, 9,900,000 person trips were made by residents of other provinces of Canada to the Province of Ontario. This resulted in expenditures of \$474,000,000 (Ontario Tourism Statistical Handbook, Table 2.1, p.13). This gives a figure of \$47.87 per person trip. Given the high usage of private cottages by residents of other provinces visiting the study area, we feel this figure is too high. We have reduced it accordingly to \$40.00 per person trip.
- In 1976, 933,000 person trips were made by residents of countries other than the U.S.A. and Canada to the Province of Ontario. This resulted in expenditures of \$240,000,000 (Ontario Tourism Statistical Handbook, Table 2.1, p.13). This gives a figure of \$257.23 per person trip. This figure is high because it includes a pro rata share of transportation costs for travel to Canada. It also reflects the long average length of stay of such visitors. Because most international visitors to the study area are passing through or on a day visit from southern Ontario, we have reduced this figure to \$50.00 per person trip.
- We have used the mid point between estimated high and low visitation to the area to estimate the number of person trips.
- In 1976, a multiplier was calculated for tourism expenditure within the Georgian Bay Economic Region. The multiplier was calculated to be 1.17 for this region. (The Economic Impact of Tourism in Ontario and Regions, 1976, Table A-8, p.34). We have, therefore, multiplied the expenditure figure by this multiplier to arrive at a total income figure.

TABLE 87

TOURISM EXPENDITURE AND INCOME
WITHIN THE STUDY AREA IN 1979

Origin	Person Trips (000's)	Expenditure/ Person Trip	Expenditure (\$000)	Income (\$000)
Ontario	5,907.0	\$ 42.95	\$253,706.0	\$296,836.0
U.S.A.	130.2	50.84	6,619.0	7,744.2
Other Canada	23.6	57.07	1,347.0	1,576.0
International	19.5	71.41	1,392.0	1,628.6
TOTAL	6,080.3	\$ 43.26	\$263,064.0	\$307,784.8

The above table is based on the following data and assumptions:

- We have used the per person trip expenditure figures for 1976 and inflated them using the Travel Price Index as calculated by Statistics Canada. We have used the same multiplier of 1.17.
- We have increased or decreased the number of person trips to the study area in line with the short term forecasts calculated in the previous section. Again, we have used the mid point between high and low visitation to estimate the number of person trips.

Allowing for inflation at 9% per annum and allowing for increased visitation, we estimate that using the same multiplier, total tourism expenditures in the study area in 1984 will be \$443,895,000 generating \$519,357,000 in income.

5.4 ACTIVITY PREFERENCES AND SPECIALTY MARKETS

5.4.1 ACTIVITY PREFERENCES

Tables 88 and 89 contain survey data on activity preferences of visitors to the Georgian Lakelands Area. Although Georgian Lakelands Area extends beyond the study area, the data are applicable to the study area and supplementary data from specific regions within the study area were included in the survey.

5.4.2 SPECIALTY MARKETS

a) Recreational Boating

A recent study, <u>A program for Recreational Harbours in Ontario</u> (1979), estimates that in 1978 707,300 households in Ontario owned 958,000 boats. This means 24% of Ontario's households owned one or more boats.

They further estimate that since 1972 there has been a 4% p.a. increase in the boat population and by 1979 there were 1,015,300 boats in Ontario.

The study estimates that 42% of Ontario residents have participated once in some form of boating in the previous 12 months. The average number of occasions per participant per year is 13.

Therefore in 1979 they estimate that 3.2 million Ontario residents went boating. They accounted for 42.5 million boating occasions (boater days). In addition, those who went sport fishing by boat accounted for a further 19 million occasions.

A significant number of U.S. residents participate in boating in Ontario. In 1978, of the 846,000 U.S. residents who entered Canada by boat, 88% entered via Ontario. Of those who entered via Ontario 28%, or 207,000 were in private boats.

DISTRIBUTION OF PARTICIPATION IN SELECTED ACTIVITIES IN THE GEORGIAN AREA TABLE 88

BY MAJOR MARKET SEGMENT

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WEEKEND/VACATION TRIPS

	Metro Toronto Residents	Ontario Residents %	Metro Toronto Residents	Ontario Residents	U.S. Residents
Swimming	19.0	23.7	21.6	20.9	27.3
Boating	26.7	9.6	17.2	15.4	20.5
Fishing	5.7	6.8	8.1	9.1	13.1
Cross Country Skiing	0.5	9.0	0.8	0.5	n/a
Downhill Skiing	n/a	n/a	1.7	1.3	n/a
Snowmobiling	1.3	6.5	2.3	2.1	n/a
Recreational Cycling	n/a	14.2	2.7	1.9	n/a
Picnicking	10.2	5.5	2.3	2.1	3.3
Visiting a Cottage	n/a	n/a	23.5	27.3	n/a
Camping	n/a	n/a	3.6	5.5	n/a
Other	1	1	ı	g.	25.1
TOTAL	100.0	100.0	100.0	100.0	100.0

Percentage of Annual Occasions.

Source: 1973 Ontario Recreation Survey

1973-4 U.S. Auto Exit Survey.

TABLE 89

TOTAL PROVINCIAL AND METRO TORONTO

MARKET SEGMENT PARTICIPATION IN SELECTED ACTIVITIES IN THE GEORGIAN BAY AREA AS A PERCENTAGE OF THEIR PARTICIPATION IN THESE ACTIVITIES IN ONTARIO AS A WHOLE

Activities Participated in in Georgian Bay	Percentage of Annual Occasions Participated in by Metro Toronto Residents	ual Occasions Metro Toronto ts	Percentage of Annual Occasions Participated in by Ontario Residents	ual Occasions ntario Residents
	Georgian Bay	Ontario	Georgian Bay	Ontario
Swimming	19.8	100	15.6	100
Boating	58.4	100	32.6	. 100
Fishing	49.9	100	25.2	100
Cross Country Skiing	39.1	100	19.4	100
Downhill Skiing	34.6	100	16.2	100
Snowmobiling	9.99	100	22.9	100
Recreational Cycling	3.3	100	6.1	100
Hiking	25.5	100	21.1	100
Water Skiing	54.6	100	33.6	100
Recreational Driving	15.3	100	12.2	100
Picnicking	19.0	100	13.2	100
Visiting a Cottage	34.5	100	25.0	100
Camping	25.9	100	15.8	100

Source: 1973 Ontario Recreation Survey.

Overall boating demand in Ontario is estimated at 66 million occasions, with 9 million or 14%, being non-resident demand.

Georgian Bay is estimated to get 8.1 million boating occasions, 12% of those occurring in Ontario. The Trent Waterway - Lake Simcoe region is estimated to get 10.1 million boating occasions, a further 15% of Ontario's boating occasions.

Cruising is very popular in the Georgian Bay, Trent Waterway - Lake Simcoe areas and in these waters, cabin cruisers are often used for accommodation. Non-resident boating is also of significance in the Georgian Bay area, being 15% of demand.

The study estimates a relatively strong rate of growth in demand for boating in the Georgian Bay area. It predicts a 15% increase in demand for berths between 1979-1985 and a 12% increase in demand for ramps, growth rates of 2.4% p.a. and 1.9% p.a. respectively.

A study of the marina facilities of the Tiny Tay peninsula, on the southern shores of Georgian Bay, was undertaken in 1979.

It confirmed the strong demand for boating in the area. Seventy-eight per cent of boats being used in the area were power boats, 22% were sailboats. Of boaters interviewed 78% used their boats for pleasure cruising.

Sixty per cent of the boaters were visiting the area for the weekend and did so on a regular basis. Thirty-four per cent of the boaters came from Toronto. Twenty per cent of the boaters were local residents. Of the 80% non local boaters, 57% had household incomes of \$30,000 or more. Fifty-eight per cent of the non local boaters used their own boats for overnight accomodation while a further 23% used their own cottage. The overall consensus was that the area has outstanding attributes for freshwater boating.

The area has a strong competitive advantage over other areas of Ontario. It is felt the area will maintain this advantage through the first half of the 1980s.

The market is generally trading up to demand a greater variety and higher quality of facilities and services for its boats. The popularity of sailboating in the western area of the peninsula has grown rapidly in the latter half of the 1970s. It is felt that sailboats will become an even larger segment of the boat population in the 1980s.

Demand for boats will continue to grow quickly in Ontario. Boats, particularly sailboats, are now perceived as good investments which appreciate quickly and are thus seen as an attractive alternative to investment in a cottage. The area, with its outstanding natural water resources can capitalize strongly upon this continued growth.

b) Downhill Skiing

In 1976 it was estimated 420,000 Ontario residents of 14 years and over participated in downhill skiing. Twenty-one per cent of all Ontario households were estimated to contain a member who had skied during the previous 12 months.

For the Canadian population as a whole 62% of active downhill skiers are between 14 and 25 years old. Twenty-six per cent of them have managerial/technological/social/cultural occupations by comparison with 15% of the population as a whole.

In Ontario as a whole 67 persons per 1,000 population were downhill skiers in 1976. In Toronto, 91 persons per 1,000 population were downhill skiers. The average age of the Toronto skier is 28 years, older than the national average. In 1979, 32% of Toronto downhill skiers had household incomes of \$30,000 or more compared to 23% for the Toronto population as a whole.

Forty-one per cent of Toronto skiers had skied 15 days or more during the previous season (1978). They had taken 1.7 ski trips and 0.7 ski vacations. Of these ski trips, 50% lasted 2 nights, 95% were by car and 63% were of less than 3 hours travelling time. Twenty-four per cent of these ski trips were to the Collingwood area, 57% to other ski areas in Ontario.

Ski vacations were more widely dispersed with only 33% being in Ontario, and 8% in the Collingwood area. Sixty-four per cent were of less than 6 hours travelling time and 74% of all ski vacations used a car for transportation.

Within the area itself, 36% of the skiers stayed for 1 day, 32% for 2 days, 13% stayed for 6 days or more. The trend appears to be toward longer stays in the area with fewer skiers being able to afford long ski vacations away from their home province.

Half the skiers originate from Toronto and 58% of all downhill skiers use a cottage or chalet for accommodation. An increasing number have been using commercial accommodation in the area.

Skiers in the area are generally active, 43% skiing more than 16 days per season. The skiers like to visit a variety of hills in the area rather than just continually visiting one resort. Party sizes tend to be large, 38% being 4 or more persons.

c) Cross Country Skiing

Participation in cross country skiing has grown rapidly in Canada during the 1970s. In 1970 it was estimated that only 13,000 pairs of cross-country skis were imported into Canada. By contrast, Statistics Canada estimated that domestic consumption of such skis in 1978 was 900,000 pairs.

In 1976 it was estimated that there were 363,000 cross-country skiers of 14 years and older resident in Ontario, giving 78 cross-country skiers per 1,000 population across the province as a whole. This is higher than the number of downhill skiers per 1,000 population across the province.

Parks Canada has projected a 1.9 p.a. growth in participation in cross-country skiing over the period 1980 to 1985. It is to be remembered that the rate of participation grew steeply during the 1970s and is already at a relatively high level in Ontario.

Nationally, only 44% of cross-country skiers are less than 25 years old, while 62% of downhill skiers are below 25 years old. Forty-one per cent of cross-country skiers are 25 to 45 years old. Twenty-nine per cent of these skiers are in managerial/technological/social/cultural occupations while only 15% of the population as a whole have such occupations.

Again by contrast with downhill skiing, participation is split evenly by males and females. Additionally, 51% of cross-country skiers are married compared with 38% of downhill skiers.

Toronto has a lower number of cross-country skiers per 1,000 population than the provincial average, 65 per 1,000 compared to 78 per 1,000. Given the appeal of this activity to the more affluent, better educated, managerial/professional person, a profile consistent with the market in Toronto, it would appear that there is considerable potential for the area to tap this market.

The southern part of the area is felt to be the northern limit for a comfortable day trip for cross-country skiing from Toronto. Snowfall is less reliable in the immediate proximity of Toronto. The area can therefore market itself as having interesting trails with reliable snowfall within reasonable driving distance of Toronto.

d) Snowmobiling

In 1976 it was estimated that 242,000 households in Ontario owned one or more snowmobiles. By 1977, it was estimated this had increased to 247,000 households, reaching 253,000 households in 1978. These are increases of 2.1% and 2.4% p.a. respectively.

The rate of increase of household formation during these two years was 2.3% and 2.8% respectively. The purchase of snow-mobiles is growing less quickly than the rate of household formation. The percentage of households owning one or more snowmobiles declined very slightly over these years.

By comparison with skiers, in 1976 it was estimated that 487,000 households in Ontario owned one or more pairs of skis. Thus 18.7% of households owned skis, and 9.3% households owned one or more snowmobiles.

The Ontario Recreation Survey in 1973 estimated that, of participation in major selected activities in the Georgian Bay Area, just over 2% of annual occasions were in snowmobiling on weekend and vacation trips. At that time participation in snowmobiling exceeded participation in skiing. It would appear that participation in snowmobiling has grown less quickly than in downhill and cross-country skiing and its growth has levelled off. It does not appear to be a strong market around which marketing strategies can be based.

e) Waterskiing

In 1973 the Ontario Recreational Study estimated that of the major recreational activities participated in on weekend or vacation trips in the Georgian Bay Strata area by the residents of Toronto and Ontario. Six per cent and four per cent respectively of the total

annual occasions of participation were in waterskiing. The sport ranked 5th for the residents of Toronto in terms of percentage of total occasions of participation in major recreational activities in the area, and 8th for the residents of Ontario.

In 1976, Statistics Canada estimated that 125,000 persons in Canada had participated in waterskiing at least once during the previous 12 months. Waterskiing ranked 24th in the activities participated in by Canadians. It ranked 27th as a sport Canadians would like to start participating in. That is lower than its market share at that time, indicating that other sports were favoured in preference to waterskiing.

Although participation in waterskiing was relatively high in the Georgian Bay Strata Area in 1973, it was pointed out by the Ontario Waterski Association that much, if not all, of this waterskiing occurs in Muskoka and the Haliburton area. Georgian Bay and Lake Simcoe are not felt to be good areas for participating in the sport due to the size of the waterbodies and the consequent lack of sheltered, calm water.

Indications are that participation in the sport is growing very slowly if at all. In Ontario it is linked very strongly with cottage ownership by a sheltered water body. The study area as a whole does not offer these conditions and our conclusion would be that waterskiing is not a strong market segment which could be developed.

f) Recreational Cycling

In 1973 the Ontario Recreation Study estimated that of the major recreational activities participated in on weekend and/or vacation trips by the residents of Toronto and Ontario, 3% and 2% respectively of the total annual occasions of participation were in recreational cycling. Cycling ranked 8th for the residents of Toronto

in terms of the percentage of total occasions of participation in major recreational activities in the area, and 11th for the residents of Ontario.

In 1976, Statistics Canada estimated that 250,000 persons in Canada had participated in cycling at least once during the previous 12 months. The sport ranked 11th in the activities participated in by Canadians. It ranked 24th as a sport Canadians would like to start to participate in, that is much lower than its market share at that time, indicating that other sports were favoured in preference to cycling. The estimate of participation was derived from a write-in response and is, therefore, felt to be low.

A further Statistics Canada survey of the ownership of recreational equipment by Canadian Householders estimated that in 1976 1,073,000 Ontario households owned one or more adult sized bicycles. This comprised 41% of Ontario households at that time.

Since 1976 the number of Ontario households owning one or more adult sized bicycles has grown more quickly than the rate of household formation.

TABLE 90

PERCENT GROWTH IN BICYCLE OWNERSHIP

	Percent Growth of Ownership overprevious years	Percent Growth of Households over previous years
1977	+ 3.9%	+ 2.3%
1978	+ 6.0%	+ 2.8%
1979	+ 3.7%	+ 2.6%

By 1979, Statistics Canada estimated that 44% of Ontario households owned one or more adult sized bicycles and that there had been a growth of 14% in households which owned bicycles during the period 1976 - 1979.

It would appear that participation in the sport is growing relatively quickly. The Ontario Recreation Study determined that the recreational bicyclist is relatively young, with an average age of 25 years, is a high school graduate rather than a university graduate, and in 1973 had an average annual household income of \$11,000.

Bicycling ranked 62nd out of 73 major activities when the activities were ranked by the average annual household income of participants. This indicates a less affluent market.

While the ownership of bicycles has increased steadily over the latter part of the 1970s, it would appear that the market segment is less affluent than participants in many other activities and may therefore be vulnerable during a period of economic retrenchment. The segment does not appear to be a strong one nor one that has much potential for the area.

g) Windsurfing

Windsurfing is a relatively new sport to Canada and has become popular only since the late 1970s. The sport originated in California but is now practiced throughout the world.

The Nottawasaga Bay is considered particularly suitable for wind-surfing. The prime location is the beach at Craigleith, midway between Collingwood and Thornbury. The beach slopes very gradually below the waterline and has a sandy floor. Upwards of 100 yards from shore the water is no more than 6 to 8 feet deep. This results in warm, shallow water, ideal for windsurfing.

In 1976, the Eastern Canadian Championships were held here. In 1977 so were the North American Open Championships. The consensus of participants was that the location has all the attributes to become one of the prime locations for windsurfing in North America.

In 1979, it was estimated that 2,500 windsurfing boards were sold in Canada. 20% of these were sold in Toronto. It was further estimated that growth in sales has been doubling every year since 1976. During 1979 there was considerable interest shown in the sport and it is predicted by the provincial Windsurfing Association that growth in participation will at least triple every year during the first half of the 1980s.

The demographic profile of windsurfing is extremely similar to downhill skiers, windsurfers being relatively young and relatively affluent.

Participation in the sport will continue to grow quickly during the 1980s. Given the similarity of the profiles of participants in windsurfing and downhill skiing and the proximity of the outstanding beach at Craigleith to the ski slopes of the Blue Mountains, it would seem a good marketing strategy to attempt to link the two sports together to develop a four season clientele.

h) Tour Boats

The 30,000 Islands, which lie to the immediate north-west of the study area are generally regarded as one of the finest cruising waters in North America. A small number of tour boat operators offer boat tours during the summer months in these waters but, as yet, traffic is relatively light.

One major tour operator based in Midland handled 30,000 passengers in the summer of 1979. In addition the operator handled

almost as many school children in charter group parties. Another operator in the area handled 4,000 passengers during the summer months.

In both instances growth in traffic has been slow but steady. This small rate of increase in traffic is expected to be maintained during the early 1980s.

Patronage of the boats is heavily concentrated into the peak months of July and August. The largest of the two operators over the season as a whole turned away 10% more traffic than he could handle. The tours were sold out on 76% of the days they were offered in 1979.

By contrast with the 1,000 Islands, which are located in the south-east part of Ontario, at the eastern end of Lake Ontario, the 30,000 Islands boat tour business is not as well developed.

In 1979, major Canadian operators in the Kingston and Gananoque area of the 1,000 Islands handled approximately 200,000 passengers. The growth in their business has been a steady 5% p.a. In addition, much of their patronage is by U.S. visitors and U.S. operators handle an additional 225,000 visitors.

A further significant point is that the boat tour operators in the 1,000 Islands have developed strong links with the bus tour operators in the province and the travel trade in general. A number of bus tours through Eastern Ontario offer a boat tour of the 1,000 Islands as part of the tour package.

The 30,000 Islands have considerable potential for the development of boat tour traffic. Links with the travel trade should be initiated and strengthened. Packages should be developed. Overall marketing of the tours should be increased. It would appear that boat tours have considerable attractions to U.S. visitors, to other Canadian residents, and to overseas visitors as well as to the major markets of Toronto and Ontario.

i) Visitation to Historic/Cultural Attractions

In 1973 the Ontario Recreation Study determined that visiting a developed historic site was the tenth most preferred activity for a weekend trip and the sixth most preferred activity for a vacation trip.

In overall participation, visiting a developed historic site ranked eleventh out of 73 recreational activities. Given the historic attractions of the zone, particularly in northern Huronia, it is surprising that apart from Sainte Marie among the Hurons, visitation to historic sites in the zone is relatively low.

In 1979, 139,000 persons visited Sainte Marie among the Hurons. A survey of license plates during the summer of 1979 indicated that 92% of automobiles came from Ontario, 2% from Quebec, 1% were from the rest of Canada. A further 5% were from the U.S. An analysis of the visitors' book indicated that 15% of those who signed the book came from countries other than the U.S. and Canada. As only 10% of visitors signed the book it would appear that international visitation is probably in the order of 2% to 2.5% of total visitation.

Visitation origins appear to be 90% Ontario, 1.9% Quebec, 0.9% other Canada, 4.9% U.S., 2.3% International. This is consistent with the 1978 3rd Quarter Statistics Canada Survey.

Visitation peaks very strongly in July and August. These two months get 59% of the seasons visitation. During these 2 months visitation averages 1,200 persons per day, the busiest days being Sundays, with Fridays and Saturdays being the least busy.

A 1978 survey at Sainte Marie among the Hurons determined that 27% of groups visiting the site had only two persons and a further 24% had four persons in their group. The average party size was just over 4 persons. Significantly 46% of the groups did not include children.

Fifty per cent of visitors to the site were on day trips, 45% were staying overnight in the area and 50% were local residents. Of those staying overnight 33% were staying in a hotel/motel, 27% were camping and 17% were staying in a private cottage.

The average length of stay at the site was 2 hours. Sixty-four per cent of the visitors had not visited the site before. Sixteen per cent had visited it once before, nine per cent twice before.

Visitation to the Historic Naval and Military Establishments in the area was much lower, 15,408 persons in 1979. A survey was also conducted at this site in 1978. It determined that 88% of respondents were from Ontario, 4% from Quebec, with 2% from the rest of Canada. Four per cent of visitors were from the U.S. with 2% from overseas.

A much higher number of visitors were staying overnight in the area (64%) by comparison with visitation at Sainte Marie among the Hurons. The most popular form of accommodation was a cottage, 21%, with 17% using campgrounds and only 14% using hotels and motels.

Groups were slightly smaller at 3.7 persons but again 40% of the groups did not include children. Twenty-seven per cent of the groups were of two people, 30% were of four people. Ninety per cent of the visitors were visiting the site for the first time. The average length of stay was just over $2\frac{1}{2}$ hours.

A further study concluded that the low representation of cottagers and local residents to both Sainte Marie among the Hurons and the Historic Naval and Military Establishments were common to all points of interest in the area. It was felt that the two sites in fact got a relatively good share of this market by comparison with other sites.

The overall conclusion is that once the sites are visited, there appears to be little motivation for visitors to return. It would appear that given the extremely high levels of cottagers who comprise the majority of visitors to the zone, the greatest opportunity for increasing visitors is to penetrate this market.

The best way to do this would be with the introduction of transitory events, events that occur at the site but are different each season. This should encourage much higher levels of repeat visitation. Additionally, it is likely that many cottagers visited the historic sites a number of years ago and feel no motivation to return. The introduction of such events, if properly marketed, should encourage them to revisit the sites.

j) The Convention and Corporate Meeting Business in the Zone

The resorts have fewer meetings but larger groups.

In 1978 it was estimated that the resorts in the zone averaged 49 meetings per year, averaging 77 persons per meeting. Resorts in the province as a whole averaged 26 meetings per year, averaging 56 persons per meeting.

The motor hotels in the zone averaged 70 meetings per year, averaging 58 persons per meeting.

Taking the two types of accommodation together, each establishment in the zone averaged 60 meetings per year, with 66 delegates per meeting. The provincial average, excluding Metro Toronto, for 1978 was 37 meetings with an average of 49 delegates.

The zone had significantly fewer national meetings than the provincial average.

For the province as a whole, 83% of meetings were national, eight per cent provincial. Within the zone 56% of meetings were national 43% were provincial. Only one per cent were international. Clearly this zone has limited appeal for national conventions or corporate meeting organizers.

TABLE 91

CONVENTION AND CORPORATE MEETING CHARACTERISTICS

WITHIN THE ZONE

	1978 Motor Hotels/ Motels	Resorts	Total
Number of Meetings	707	440	1,147
Number of Delegates	41,327	33,944	75,271
Average size of group			65.6 persons
Type of Meeting			
Ontario Provincial	37.3%	52.5%	43.2%
Canadian National	60.5%	47.5%	55.5%
International (U.S.)	2.2%	-	1.3%
International (Other)	-	~	-
Guest Room Revenue	\$1,339,200	\$966,000	\$2,305,200
Food/Beverage Revenue	\$754,000	\$814,000	\$1,568,000
Total Revenue	\$2,093,200	\$1,780,000	\$3,873,200
Total Revenue as a percentage of Gross Revenues	17.1%	29.1%	21.1%
Average Revenue per delegate	\$50.65	\$52.44	\$51.45

TABLE 92

CONVENTION/CORPORATE MEETING EXPENDITURES IN THE ZONE IN 1978

		ZONE	PROVINCE METRO	CE EXCLUDING O TORONTO	PROVIN	PROVINCE OF ONTARIO
	Gross Revenue	Average Per Establishment	Gross Revenue	Average Per Establishment	Gross Revenue	Average Per Establishment
Guest Room Revenue Convention/Corporate Meetings	2 305 000	121 315	17 808 000	986 09	54 996 000	156 238
Food/Beverage Revenue Convention/Corporate Meetings	1 568 000	82 526	13 446 000	46 048	35 640 000	101 250
Total Revenue Convention/Corporate Meetings	3 873 000	203 842	31 254 000	107 034	90 636 000	257 489
Gross Guest Room Revenues	7 620 000	401 053	142 051 000	486 476	289 936 000	823 681
Gross Food/Beverage Revenues	10 748 000	565 684	146 932 000	503 192	297 375 000	844 815
Gross Revenues	18 368 000	782 996	289 000 000	989 726	587 311 000	1 668 497

Number of establishments in sample zone = 19 Province excluding Metro Toronto = 292 Province of Ontario = 352

TABLE 93

CONVENTION/CORPORATE MEETING CHARACTERISTICS AND TRAVEL TRADE EXPENDITURE CHARACTERISTICS BY COMPARISON WITH THE PROVINCE AS A WHOLE AND THE PROVINCE EXCLUDING METRO TORONTO IN 1978

	ZONE	PROVINCE EXCLUDING METRO TORONTO	PROVINCE OF ONTARIO
Average Size of Group	65.6 perso	ns 48.9 persons	48.3 persons
Average Number of Meeting per year per Establishmen	~	37.5	70.4
Total Revenue from Meetin as a Percentage of Gross Revenue	gs 21.1%	10.8%	15.4%
Average Revenue per Delegate	\$51.45	\$58.31	\$75.81
Average Revenue per Establishment	\$203,842	\$107,034	\$257,488
Travel Trade			
Average Number of Guest Nights per Establishment	2,033	2,439	3,808
Average Revenue per Guest Night	\$16.54	\$17.22	\$21.23
Average Revenue per Establishment	\$33,631	\$42,003	\$80,852
Total Travel Trade Expenditures as a Percentage of Gross Revenues	3.5%	4.2%	4.8%

Zone: Convention/Corporate Meeting Guest Room Expenditure:

Average of \$1,568 per available room.

Travel Trade Guest Room Expenditure: Average of \$435.

TABLE 94

CONVENTION/CORPORATE MEETING EXPENDITURES AS A PERCENTAGE OF TOTAL REVENUES 1978

	Zone	Province Excluding Metro Toronto	Province of Ontario
Guest Room Revenues as a Percentage of Total Guest Room Revenues	30.2%	12.5%	19.0%
Food/Beverage Revenues as a Percentage of Total Food/Beverage Revenues	14.6%	9.2%	12.0%
Total Convention/ Corporate Meeting Revenues as a Percentage of Gross Revenues	21.1%	10.8%	15.4%

TABLE 95

TRAVEL TRADE EXPENDITURES AS A PERCENTAGE OF TOTAL REVENUES

	Zone	Province Excluding Metro Toronto	Province of Ontario
Guest Room Revenues as a Percentage of Total Guest Room Revenue	8.4%	8.6%	9.8%
Total Travel Trade Revenues as a Percentage of Gross Revenues	3.5%	4.2%	4.8%

Convention and Corporate meeting guest room revenues were very important to the accommodation sector of the zone.

In 1978, 30% of the total guest room revenues for the major establishments in the zone came from convention and corporate meeting delegates. This was extremely high, particularly when compared with the provincial average, which was 19%. Convention and Corporate Meetings' expenditures comprise 21% of gross revenues of establishments in the zone. The average for the province as a whole was 15%, and for the province excluding Metro Toronto, it was 11%.

Expenditure per delegate was much lower than the provincial average, though only somewhat lower than the provincial average when Metro Toronto was excluded from the figures.

In Ontario as a whole, delegates to conventions and corporate meetings spent an average of \$75.81. The average expenditure per delegate in the province excluding Metro Toronto was \$58.31. Delegates to similar meetings in the zone spent an average of \$51.45 or 11% less than the provincial average excluding Metro Toronto.

However, given the high number of delegates who attended meetings in the zone, the average revenue per establishment from such meetings was \$204,000. This compares with \$257,000 for establishments in the province as a whole and \$107,000 for the province outside of Metro Toronto.

TABLE 96

CONVENTION/CORPORATE MEETING AND TRAVEL TRADE EXPENDITURE IN THE ZONE AS A PERCENTAGE OF THE PROVINCE AS A WHOLE

Zone as a Percentage of the Province Excluding Metro	Zone as a Percentage of the Province of Ontario
Toronto	
6.5%	5.4%
12.9%	4.2%
11.7%	4.4%
12.4%	4.3%
5.2%	2.2%
5.4%	2.6%
7.3%	3.6%
6.4%	3.1%
	Percentage of the Province Excluding Metro Toronto 6.5% 12.9% 11.7% 12.4% 5.2% 5.4% 7.3%

The establishments have a good share of the market because of their low prices.

Although the zone has 6.5% of the commercial accommodation in the province of Ontario outside of Metro Toronto, it gets 12% of the convention and corporate meeting expenditures spent there. The zone gets 10.5% of the meetings held outside of Toronto and 14% of the delegates.

It would appear that the major reason for this good penetration is the price advantage offered by the zone. Establishments in the province as a whole average 3,400 delegates per year at \$75.81 per delegate. Establishments in the zone average 3,960 delegates per year but at \$51.45 per delegate. Thus the establishment got 16% more delegates but the expenditure was 32% lower than the provincial average. Compared to the province excluding Metro Toronto, establishments in the zone got 54% more delegates on average, but the expenditure was 12% lower.

The establishments were dependent upon volume to maintain their revenues. Should the relatively large party size begin to contract, party sizes being 36% larger than the provincial average, (66 to 48), the establishments will become very vulnerable. To maintain their revenues at existing levels they will have to then increase their rates thus making them much less competitive.

The zone got many more conventions than the provincial average.

In 1978, 68% of the delegates attended conventions, and 44% of the meetings in the zone were conventions. The average size was 100 persons. The average expenditure per delegate was \$42.46.

For the province as a whole, although 60% of the delegates were involved in conventions, only 13% of the meetings were conventions. The average size was 227 persons. The average expenditure per delegate was \$68.21.

The zone is attracting price sensitive conventions. This is a rather dangerous marketing strategy as the zone has to offer a total price advantage to retain its share of the market. Should transportation costs increase significantly or should disposable income fail to grow sufficiently quickly, it is likely that the size and number of such conventions will contract.

*Corporate meetings comprised 56% of the meetings held in the zone in 1978 but only 32% of the delegates. The average expenditure per delegate however, was \$70.73. It would seem that the establishments in the zone could usefully consider a marketing strategy aimed more at this market.

TABLE 97

TRAVEL TRADE EXPENDITURE CHARACTERISTICS

IN THE ZONE 1978

Zone	Motor Hotels/ Motels	Resorts	Total
Number of Guest Nights	31,314	7,317	38,631
Guest Room Revenue	\$494,200	\$144,800	\$639,000
Average Revenue per Guest	\$15.78	\$19.79	\$16.54
Percentage of Total Guest Room Revenue	10.1%	5.4%	8.5%

Travel trade expenditures were relatively low.

Guest room revenue in the establishments in the zone derived from the travel trade totalled \$639,000 in 1978, an average of \$34,000 per establishment. The average revenue per guest night was just \$16.54. The average for the province outside of Metro Toronto was \$17.22 per guest night.

As a percentage of all travel trade expenditures in the province outside of Metro Toronto, the zone gets 5.2%. Once again it appears the establishments are 'buying' their share of the market. Guest night expenditures are 22% lower than the overall provincial average and 4% lower than the province excluding Metro Toronto expenditures per guest. In this instance the strategy is

not as successful as with the convention and corporate meetings business as the average number of guest nights per establishment in the zone was 2,033 in 1978 compared with 2,439 for the province excluding Metro Toronto. The result is approximately 20% less revenue per establishment when compared with the province excluding Metro Toronto.

In 1978, the motor hotels in the zone got 81% of the travel trade guest nights, the resorts 19%. The average expenditure per guest night in the motor hotels was \$15.78. The average room rate for comparable properties in the zone in 1978 was estimated to be \$28.29. Allowing for double occupancy the travel trade guest night expenditure was \$32.56 per room, not a significant amount above the average room rate and a contributory factor to its relatively low level.

Travel trade expenditures in the zone were low at 3.5% of gross revenue. Given the fact that the area has relatively high levels of tourist visitation it would appear that the resorts of the zone particularly have an opportunity to penetrate this market further.

k) Resort Timesharing

Timesharing is a new concept for the sale of resort rooms and units which evolved in the 1970s. Essentially what happens is that a resort offers its inventory of room and/or condominium units to the market, selling the exclusive 'right to use' a unit for a specific annual time period, usually one or two weeks. In addition, the buyer acquires a fee interest in the unit. There are resorts which offer a limited partnership scheme but these are much less popular than the 'right to use' approach.

There are now a large number of resort time-sharing locations throughout the world. Because of this, many buyers have the opportunity of swapping their week in one location for a week in

 ■another location. This means the purchaser is not locked into the one location for the duration of the contract.

The purchase price of time intervals in 1980 tends to run at \$4,000 to \$8,000 per week, depending upon the size and facilities of the unit, the location of the resort, and the season of the year in which the week falls. Most weeks are purchased for a ten to twenty year period.

Growth in the number of locations offering time-sharing has been very rapid. Prior to 1974 there were 8 locations in the U.S., excluding time-shared recreational vehicle campgrounds. In 1976 there were 95 locations. By the end of 1979 there were 350. It is predicted by the end of 1980 there will be 425 to 475 locations in total.

The leading club in the field, the American International Vacation Club, increased its sales from \$27 million in 1978 to \$38 million in 1979. The total sales of the 11 leading timesharing companies in the U.S. increased from \$76 million in 1978 to \$166 million in 1979, a 118% increase.

Canada currently has 12 time-sharing locations, either in the market or in an advanced planning stage. The major time-sharing development in southern Ontario is at Lagoon City on the eastern shores of Lake Simcoe.

The major advantage of time-sharing is that the price of units is comparable to, for example, a new economy or compact car. Thus it is a real estate product which is comparable in price to other mass marketed consumer products. Unlike many of these products the purchase of a week is likely to appreciate rather than depreciate in value.

The long term prospects for the resort industry appear very good. It would appear that the concept of time-sharing is something which should be seriously considered by developers of resorts, or owners of existing suitable resorts, for the study area.

5.5 AVAILABLE MARKET DATA - QUALIFYING REMARKS

Figure 14 lists the surveys we have consulted. This Figure is designed to show what data are available, what definitions were used, and the methodologies employed.

For data identifying the volume and characteristics of person trips taken by the residents of Ontario the following surveys have been consulted:

- 1973 Ontario Recreation Study (M.I.T.)
- 1976 Travel Survey of Ontario Households (M.I.T.)
- 1977 2nd Quarter Canadian Travel Survey (Statistics Canada)
- 1978 3rd Quarter Canadian Travel Survey (Statistics Canada)

Ontario suffers from a lack of consistent, reliable surveys of the travel patterns of its residents. All of the above surveys have weaknesses and the data must therefore be interpreted with care.

1976: Ontario Household Survey

The 1976 survey is probably the best there is to identify the travel patterns of the residents of Ontario. However, nothing similar to it was undertaken in the early years of the 1970s nor since its completion in 1976. A household survey was attempted in 1977. It used a much smaller sample size with a two-month, rather than one-month, recall. The data are not felt to be reliable.

.

Comparison of Surveys Data

		Canadian Trivel Survey 1971	Ontarto Recreation Study 1977	Considien Travel Survey 1974	Travel Survey of Onterio Households 1976	Travel Survey of Ontario Households 1977	Casadian Travel Survey 1977 2nd Overter	Canadian Travel Survey 1970 3rd Quarter	U , Rate Exit Surety 1974
	ENTA ELDIEITS								
	PENTOD COVERED	Jan 1 - Gec 31 1971	May 1, 1973 - April 30, 1974	May 1 + 160 to 30, 1971	Jan. 1 - Dec. 31, 1976	120 1 - Occ 51, 1977	April t - June 30, 1977	Auly 1 - Sept .0, 1978	July 1, 1973 - June 30, 197
	THE OFFIRETION	100 miles or nore	Away From home at least one wight	100 mt es or non-	25 offes or more	25 mile, ne core	to start or none	\$0 miles or more	Party is son-commercial vehicle leaving Province
	Age	Selected Parson only	All penbers	Selected Forsen only	Kezd of Hausehold Only	Head of Household Only	ATI Perhers	Selected Person Only	All nesters of party
	Squ	Selected Person only	All members	Selected Person orly	Not Asked	Brad of household Only	All Febers	Selected Person only	hot asked
	Refital Status	Relation to head of Household	All monters	Selected Person o: ;	"ot Asked	vic A. ed	All Nerbers	Selected Person only	Mat asked
	Occupation	Head of Household	Head of rouseholds & Selected person only	Selected Person r ,	et Asked	hat Asked	All Henbers	Selected Person only	Party Heads only
10101888 175	Education	Pead of Household	Head of Household & Selected person only	Not Eskel	head of Household Only	Mead of rousehold Only	All Hesbert	Selected Person only	Not Asked
	Income	Mausehold Lacone	Household & Selected Persons Income	Not Asked	heusehold Income	Mausehold Income	frot Asked	Mausehold Incom	Party Heads only
	Household size & Copposition	Asked	Asked	Not Aseed	tot Rakes	hat Asked	Astro	hot Asked	Not Asked
	Provincial	Atlant	Atred	Selected true cats	Gld	Asked	Asted	taked	Asked
	Sub-Provincial	Asked but limited information	Asked	Not Assed	Asked	Not Asked	Asted	Askod	Assed
	Visitor Stops between 0/0	Asked but Ifeited	Rot Asked	Apt Askell	Fot Asked	Not Asked	Nights spent in each Province	Bilghts spent in each Province	hot Asked
	Size of Party	Asked	Asked	Selected Trip only		Asked	Household members only	Heusehold agabers asly	Asked
TRIP DWRACIERISTICS	Purpose	Asked - main 9 different	Reked Last 3 vocation trips Last 4 weekend trips	Asked (Trips to Canada enly)	Asked - Main 4 different	Asked - Halm 4 different	Asked - all 5 different	Paked - Main 4 different	Asked - Main 15
	Mode of Transportation	Asked - 6 different	Asked - 9 different	Asked (Trips to Canada only)	Asked - Hain 8 different	Not Askeo	Raked - Hain G different	Asterd - Main 6 different	es fres
	Type of Accomposation	Asked - 9 different	Askes - 17 different	Selected Trip Only	Asked - 9 different	Pot Asked	Rot Asked	Asked - AST 7 different	toled 7 distances
	Activities	Asked - 10 different	Asked - 83 different	Apt Askel	Not Asked	Not Asked	Not Asked	Not Asked	Asked - 22 Ifferent
	Vacation Trip or not	Pot esked	Asked	Selected Trip Only		barta	Ashed	Asked	hot Asked
	Weekend trip or not	Fot asked	Assed	Apt Askes	Not Asked	Not Asked	Agaigd	Asked	Not Asked
	Total	Astro	Not Asked	Rot Ashed	71508	Asket	Hat Asked	Not Asked	Asked
XPENDITURES	Transportation	Asted	Not Asked	Not Jaxed	Tuesd	Asred	Not Assed	Not Asked	Astel
A COUNTY CO	Accompation	Aurd	Not Assed	Not fished	Autol	Not Asked	Not Asked	Hot Asked	Stred
	Sample size within Ontario	4,603	15,000	30,000 (Hational)	-2.60	15,003	+ (0.1 het)	27,700 (Aut)	\$0,015
	Response Rate	4,400	10,250	28,500	15,,40	3,700	R.O.	24,400	10,000
	Type of Survey	Parional Interviews	Personal Interview	Pc-sonal/Tolephone	Por Bigs	Mail Back	Orep Off/Pick to	Personal/Telephore	Porson Interview
120,000 KT	Persons covered In Hauschold	Randonly selected person 14 years and over	All members 12 years and over	Randonly selected 16 years and over	All compers no age limit	All Hambers no age light	All numbers so age limit	Selected omber - no age limit	All numbers in party
	Recall Period	1 routh	y Footh	north.	I month	2 postto	3 contbs	. ronths	Duration of trip
	500150Y/5	Office of Tourish	Covernment of Ostario	CGOT/State Canada	Cot. Him. of Ind. Tourism	Cos. Nin, of Ind. Tourism	Ministry of Transport	0607	0101
	Conducted By	Statistics Carada	Consultant	Statistics Canada	0611	0817	Statistics Centria	Statistics Canada	Yes, 1

Figure 14



The 1976 survey was based on a mail-out mail-back survey vehicle. Questionnaires were sent to 57,600 households over the year 1976. A total of 15,200 questionnaires were returned yielding a response rate of 26%. To determine if those who did not respond had very different types of trips from those who did respond, follow up surveys were conducted in two representative months. These were to be representative of high and low periods of trip taking. Any differences in trip characteristics of the two groups of respondents were taken into consideration when determining the overall final volumes.

The weakness of mail-out mail-back surveys is the low response rate. People who respond to these surveys tend to be people who are generally positive about questionnaires. This bias has to be corrected for. Additionally, there can be problems in determining if the number of people who say they did not take any trips is representative of the population as a whole. This latter phenomenon was, in fact, analysed and the numbers recorded are felt to be consistent with the results of other surveys conducted by different methodologies.

For the purpose of the Ontario Household survey, a trip was defined as being of 25 miles or more one way. This is a relatively short distance (it is approximately 22 miles one way from Toronto International Airport to the Toronto Zoo in the east end of the city) and there is a possibility of under-reporting of these short trips.

The results of the 1976 survey was closely analysed after the data were first published with respect to visitation volumes. As a result, the weighting procedures were amended. The data we have used reflects these amendments.

1973 Ontario Recreation Study

We have not made extensive use of the Ontario Recreation Study (ORS). There are a number of reasons for this.

The study is origin oriented not destination oriented. Because of this, neither the sample nor weighting procedures were designed to provide anything other than estimates of participation at the strata (Georgian Bay region) level. If an attempt is made to estimate participation for locations below the strata level, an extremely complex series of calculations has to be entered into to reweight the data. This is to allow home based and non-home based trips to be reconciled and properly weighted. Consequently because of this major constraint the data derived from the ORS are not as comprehensive as they might otherwise be.

In addition, the ORS data were collected during 1973. These data are now seven years old. Much has happened during the late 1970s to alter participation rates. The growth of participation in cross-country skiing is a particular example.

The 1977 and 1978 Canadian Travel Surveys

Statistics Canada has conducted surveys of the trip characteristics of Canadians as an addition to the Canadian Labour Force Survey on a number of occasions during the 1970s. These surveys have never been continuous.

In 1971 and 1974, the surveys identified trips taken of 100 miles or more one way and asked only for details of the longest trip.

In 1977 the trip definition was changed to trips of 50 miles or more one way and asked for details of all trips. In 1977, the second quarter of the year, April to June, was surveyed. In 1978, the third quarter, July to August, was surveyed. Consequently the two cannot be compared.

In 1977, 38,000 Canadians were contacted and 36,100 responded to the survey. In 1978, 27,700 Canadians were contacted and 24,400 responded. Of these 5,400 were residents of Ontario. The survey used a three month recall period. It is our opinion that this methodology may lead to underreporting of trips.

Only the final destination was recorded at the sub provincial level. Although the traveller was asked where and for how many nights he/she stayed on the way to the final destination, the location was recorded only at the province level. This means that it is impossible to determine the number of travellers who stayed overnight in a region but who were passing through to another destination.

There is a marked difference in the total number of person trips reported by the Canadian Travel Surveys and the Ontario Household Surveys. Table 98 documents the differences among the surveys in the volume of person trips.

TABLE 98

VOLUME OF PERSON TRIPS ONTARIO TO ONTARIO

Person Trips (000's) Annual Survey Jan - Mar . Apr-June July-Sept Sept-Dec Total Canadian Travel Survey 1971 12,721 Ontario Household Survey 67,582 8,988 19,126 23,519 15,949 1976 Canadian Travel Survey 1977 42,135* 8,427 Canadian Travel Survey 12,542 1978 35,834**

^{*} Estimate based on assumption 2nd quarter = 20% of annual trips

^{**} Estimate based on assumption 3rd quarter = 35% of annual trips

Some of this difference can be accounted for because of the different trip definitions -- the 1971 survey used 100 miles, the 1976 survey used 25 miles, and the 1977 and 1978 surveys used 50 miles.

There are no reliable data available in Canada which determine the relationship between the length of trip and the frequency of trip taking. If such data were available then an assessment could be made of the number of trips which fall into the 25 to 50 mile range. Adjustments could then be made to the 1976 OHS and/or the 1977/78 CTS.

Our overall conclusion is that the different methods of surveying lead to volume figures which are incompatible. Trends cannot be accurately determined because it is not known if fluctuations in the volume of trip taking are actual or definitional.

Many problems arise from these methodological inconsistencies when trying to compare traveller and trip characteristics.

Traveller Characteristics

Demographic data were collected in 3 different ways. The 1976 Ontario Household Survey (OHS) collected data on the head of the household taking the trip. The 1977 2nd quarter CTS collected data on all members of the household taking the trip. The 1978 3rd quarter CTS collected data on the demographics of the person interviewed who took the trip.

Destination Data

Because of the sample sizes the data are frequently very unreliable at anything below the travel association or economic region level. This has caused numerous problems because the study area comprises half the Georgian Lakelands Travel Association area.

The surveys we have used present data at the following levels:

- 1973 ORS Georgian Bay Strata area
- 1976 OHS Georgian Lakelands Travel Association Area
- 1973/74 U.S. Auto Exit Survey Georgian Lakelands Travel Association Area
- 1977/1978 Canadian Travel Surveys Georgian Bay Economic Region

Drawing 11 shows the areas within the study area covered by the above surveys.

The differing levels in survey data lead to many problems in identifying what proportion of what data should be allocated to the study area. A simple pro rata figure has been used in the majority of instances but this does not lead to an accurate reporting of volumes.

Purpose of Trip

Once again different definitions for purposes of trip have been used by different survey vehicles. The 1976 OHS used four types of trip:

- Vacation; this was time from a vacation allotment used for the trip by the respondent.
- Non-vacation; this was a weekend or weekday recreational trip where no time was taken from a vacation allotment.
- Personal; this was a trip for specifically personal reasons.

 Visiting friends and relatives is a personal trip.
- Business; this was a trip for business purposes, other than travel to and from work.





The 1977 CTS used 5 different trip purposes:

- Pleasure
- Visiting
- Shopping
- Personal
- Business

All trip purposes were defined by the respondents, that is if a particular respondent felt his/her trip was for personal reasons then the trip purpose was listed as personal. All purposes were covered and 5 types of multi-purpose trip, one of which being multiple pleasure.

The 1978 CTS used 4 different trip purposes:

- Pleasure
- Visiting
- Personal
- Business

Only the main purpose of the trip was recorded. Definitions were provided to the interviewer but again the purpose was essentially self defined by the respondent.

Mode of Transportation

Some surveys asked for the main mode of transportation and some asked for all modes used. The 1973 ORS listed 9 different modes of transport; the 1976 OHS listed 8 different modes; and the 1978 CTS listed 6 different modes.

Type of Accommodation

The 1973 ORS listed 17 different types of accommodation and the 1976 OHS listed 9 different types. The 1977 CTS did not ask the question. The 1978 CTS listed 7 different types of accommodation.

Inter Provincial Travel

The Canadian Travel Surveys collect data on travel among provinces in Canada. Because of the sample size many problems arose when weighting data which identify trip taking to essentially rural areas. The 1978 3rd quarter CTS estimated that of 52,000 person trips to the Georgian Bay Economic Region from provinces other than Ontario, 9,000 or 17% were day trips. We find this hard to accept. The 1978 3rd quarter CTS also reported 46,000 person trips from Quebec to the Georgian Bay Economic Region. We find this too very hard to accept as it appears a very high figure.

There are no other sources of inter provincial travel data.

U.S. Travel

The most recent survey identifying travel to the regions of Ontario at a sub provincial level was conducted in 1973-74. Since then no surveys of U.S. travel in Ontario have been conducted.

A further problem in determining U.S. visitation to Ontario is that in 1976 responsibility for counting traffic crossing the border passed to the U.S. Budget cuts on the U.S. side have reduced the sampling of cars considerably. The data are now much more suspect than they have been in the past.

International

The characteristics of international travellers and the trips they take are only collected as they enter Canada. Even data at the provincial level are felt to be suspect. There are no reliable data at the sub provincial level.

Overall data at the provincial and regional level were extremely weak. A number of function and site specific studies have added some data but the situation is not a good one.

5.6 SOCIETAL TRENDS AND INFLUENCES

A number of social and economic trends developing today will significantly effect the future of Canada's tourism industry. By applying these trends to the province of Ontario, and, in some cases, specifically to the Metropolitan Toronto area, it is possible to discern then potential impact on the Collingwood-Midland-Orillia Tourism Zone.

Ninety-seven percent of all visitors to the study area are Ontario residents, primarily from the Toronto area. A number of these trends have been examined and are discussed in the following section.

a) Demographic Characteristics

Since 97% of all visitors to the Collingwood-Midland-Orillia area are residents of Ontario, the future size and demographic characteristics of the province's population will have a significant impact on this market. The population of Ontario in 1978 was estimated to be 8.4 million. The annual growth rate of the population was 1.42% during the early seventies; however, this rate is expected to decrease dramatically in the future. (See Table 99). The current birthrate of 1.76 (births per female) is below the replacement level of 2.12. Projected immigration to Ontario is approximately 70,000 people annually.

TABLE 99

ANNUAL GROWTH RATE OF THE ONTARIO POPULATION

1971	-	1976	-	1.42%
1976	-	1981	400	1.09%
1981	-	1986	-	1.00%
1986	-	1991	-	0.83%
1991	-	1996	-	0.63%
1996	-	2001	-	0.46%

Table 100 shows population projections for each age group, and Table 101 projects the growth of the population of Metropolitan Toronto. (The population of Metro Toronto actually shrank by 5,707 in 1979). These statistics indicate that while the population is growing slowly, its makeup by age groups is changing dramatically. The size of the over 65 retirement age group will steadily increase, as will the 40 - 60 age group, the fastest growing and traditionally, the most affluent age group. The 20 - 39 age group will remain fairly steady for the next ten years but will then begin to shrink.

TABLE 100

ONTARIO POPULATION PROJECTIONS BY AGE GROUP

	<u>19</u>	81	199	1	200	1
	<u>000</u> 's	00	000's	90	000's	96
0 40	0 707 4	04.0	0 404 4	00.4		
0 - 19	2,707.1	31.0	2,491.1	26.1	2,353.0	23.3
20 - 39	2,926.1	33.5	3,223.6	33.7	2,963.4	29.4
40 - 64	2,232.4	25.6	2,697.0	28.2	3,401.3	33.7
65	865.3	9.9	1,148.8	12.0	1,367.8	13.6
TOTAL	8,730.9	100.0	9,560.8	100.0	10,085.5	100.0

TABLE 101

POPULATION OF METROPOLITAN TORONTO

	POPULATION	% INCREASE
1976	2,124,291	-
1981	2,246,400	5.7
1986	2,351,200	4.6
1991	2,429,200	3.3
1996	2,475,900	1.9
2001	2,493,200	0.6

These demographic trends will have a major impact on the economy of Ontario and on the tourism industry. There will be a higher proportion of the population of working age than in the previous sixty years due solely to a decrease in the number of dependent children. In the future, the ratio of working population to dependent population (those over 65 and under 15) will be approximately 2.2, which is higher than at any time in this century. As the number of contributors to the public sector increase, demand for public expenditure may grow less rapidly over the next 20 years. The amount spent on education for example will decrease, but spending in some sectors (e.g. pensions, health care) may increase in the nineties as the population ages.

There will be an enormous number of teenage entrants into the labour force in the early and mid eighties reflecting the demographic bulge caused by the "echo" baby boom. (By 1990 the size of the Canadian work force will be 44% of the population, as compared to 38% in 1979). A labour shortage is very unlikely, as annual growth of the labour force will be around 2% throughout the eighties which is higher than population growth. (Table 102).

TABLE 102

ANNUAL LABOUR FORCE GROWTH IN ONTARIO

1971	-	75	-	4.0%
1978	-	82	-	2.3%
1983	-	87	-	1.9%

Table 103 projects the age and sex distribution of the Ontario labour force to the year 2001, while Table 104 indicates the percentage of each age-sex group within the work force to 1986. The percent of females in the labour force will decrease slightly between 1981 and 2001 due to the higher proportion of males in the population as a whole. The size of the 25 - 44 years group will increase between 1981 and 1991 for both males and females and then decrease between 1991 and 2001. The size of the 45 -64 and 65+ groups in the labour force will continue to increase. Table 104 shows the participation of females of all age groups in the work force will increase between 1976 and 1986, as will total participation of all people over 15 years of age.

TABLE 103

ONTARIO LABOUR FORCE: AGE-SEX DISTRIBUTION (%)

	1976	1981	1991	2001
Males				
15-19	5.5	5.1	3.6	3.8
20-24	7.9	8.1	6.1	5.6
25-44	27.9	28.7	32.1	29.2
45-64	18.1	16.6	18.0	21.3
65 +	1.4	1.4	1.6	1.8
TOTAL	60.8	60.9	61.5	61.7

TABLE 103 CONTINUED

Females	1976	1981	1991	2001
15-19	5.1	4.7	3.3	3.5
20-24	6.7	6.6	5.0	4.6
25-44	17.0	17.8	19.7	17.5
45-64	9.8	9.6	9.8	12.0
65 +	0.5	0.5	0.6	0.7
TOTAL	39.2	39.1	38.5	39.3

TABLE 104

ONTARIO LABOUR FORCE: PARTICIPATION RATES

	1976	<u>1978</u> (p	1986 projected)
Males			
15-19	53.1	58.3	62.9
20-24	84.3	96.2	87.8
25-44	96.8	97.1	95.0
45-64	88.6	88.5	86.1
65 +	17.9	17.0	20.9
Females			
15-19	51.0	52.9	58.4
20-24	69.0	72.4	73.8
25-44	58.9	63.6	65.1
45.64	4.8	4.5	4.8
TOTAL	63.9	65.5	66.6

Implication For Tourism

The population of Ontario is gradually becoming older. Trends toward early retirement, longer life expectency and better pensions will make the over 65 age group an important factor in the travel industry. These people will have both the leisure and the means to travel and will not be constrained by specific vacation periods.

The demographic bulge caused by the "echo" baby boom (the children of the children born after W.W.II) will result in an increase in the proportion of the total population between the age of 25 and 44 during the 1990s. Members of this group have traditionally been considered to be the most highly mobile population segment producing a relatively high demand for family holidays.

b) Economic Prospects

Table 105 shows projections prepared for the Ontario Economic Council by the Institute for Policy Analysis of the University of Toronto. The figures, based on a high-priced energy scenario, were computed in 1977, and are thought by the author to be slightly high (by 0.1 or 0.2%).

This table shows that the growth rate of personal disposable income will decrease compared to the 1973-77 rate. This decrease will be caused by continuing increases in the price of energy and by a greater tendency to save than was the case in the sixties. The rate of personal consumption will also decrease in comparison to the 1973-77 rate.

TABLE 105

ONTARIO ECONOMIC PROJECTIONS

	Average	Annual Per Cent	Growth
	1973-77	1978-82	1983-97
Ontario Economy			
	2.0	4.0	2.0
Gross Provincial Product (A)	3.8	4.8	3.8
Personal Disposable Income (B)	13.8	8.8	7.9
Labour Force	3.7	2.3	1.9
Unemployment Rate	5.6	7.1	5.6
National Economy			
Gross National Produce (A)	3.8	5.0	4.0
GNP Price Index (B)	9.6	4.7	7.9
Personal Consumption (A)	5.2	4.1	4.2
Personal Disposable Income	13.3	8.6	7.8
Labour Force	3.5	2.4	2.0
Unemployment Rate	6.4	. 7.7	6.1

- (A) Constant Dollars
- (B) Current Dollars

Implications for Tourism

As the growth rate of disposable income diminishes, tourists become more and more concerned with obtaining value for every dollar spent, and "no frills" travel and self-catering accommodation will become more popular.

c) Energy

The actual and perceived supply of energy will play a major role in the future direction of the tourism industry in Canada and Ontario. A number of studies have been conducted in the United States to examine the possible impact of gasoline rationing and price increases on pleasure travel. Although the Canadian situation and general attitude towards energy do differ from the American, the broad conclusions of the U.S. studies are undoubtedly applicable to Canada as well.

The U.S. studies examined a wide variety of possible pricing and rationing scenarios, but their conclusions were all quite similar. One paper. by T.M. Corsi and M.E. Harvey ⁵⁾, looked primarily at long distance vacation trips. This study, undertaken in Wisconsin in 1975, examined possible future travel trends within a scenario of a price increase of 20¢ per gallon* and a scenario of gasoline rationing of eight gallons a week. Table 106 indicates that, faced with higher prices and/or restricted fuel availability, households are willing to experiment with various vacation adjustment strategies.

^{*} It must be remembered that one U.S. gallon is equal to 5/6 of an Imperial gallon, so that U.S. and Canadian per gallon gasoline costs are not directly comparable.

TABLE 106

HOUSEHOLD ADJUSTMENTS IN RECREATIONAL TRAVEL⁵⁾

	Scenario 1			Scenario 2		
	HIGH PRICES			RESTRICTED FUEL AVAILABILITY		
	Yes*	No**	No Response	Yes	No	No Response
Use bus, train, plane	44.5%	34.6%	20.4%	58%	24.0%	18.0%
Cancel plans	45.2%	33.0%	21.8%	56%	24.8%	19.2%
Travel a shorter distance	54.3%	25.3%	20.6%	58%	21.9%	20.1%

^{*} Percentage of households indicating a willingness to adjust travel plans.

A second survey ⁶⁾ undertaken in March 1979 in Chicago, Dallas, Los Angeles, New York, Phoenix and Salt Lake City, used a scenario of prices rising to \$2 a gallon and rationing of gasoline at forty gallons a month. If this rationing scheme were put into effect, 80% of the respondents said they would take fewer trips, 76% would visit places closer to home, 53% would remain longer at their destination and 48% would visit only one destination per trip. Tables 107 and 108 show the adjustments in travel plans in different price levels for gasoline. According to these tables, the greatest consumer resistance is evident when gasoline prices reach \$1.25 per U.S. gallon.

^{**} Percentage of households indicating an unwillingness to adjust travel plans.

TABLE 107

ANTICIPATED TRAVEL DISTANCES AT VARIOUS GASOLINE PRICES BY PERSONS PLANNING TO TRAVEL BY CAR IN 1979⁶⁾

Miles	Current	\$1.00	\$1.24	\$1.50	\$2.50	40 gal. Rationing
Less 100	7.5%	8.0%	7.5%	8.5%	11.0%	12.4%
100 - 249	9.0%	11.9%	9.0%	7.5%	7.0%	8.5%
250 - 500	21.4%	19.4%	15.4%	14.9%	11.0%	14.4%
500 - 999	17.9%	16.4%	14.4%	9.0%	7.0%	9.0%
Will not Travel		7.0%	34.8%	50.3%	54.3%	47.8%

TABLE 108

PERSONS PLANNING TO TRAVEL IN 1979 6)

	Current	\$1.00	\$1.25	\$1.50	\$2.00
Automobile Recreational	60.7%	48.6%	31.8%	21.4%	17.1%
Vehicle	4.6%	4.3%	1.4%	1.1%	1.1%
Plane	19.6%	18.2%	21.8%	22.9%	24.6%
Bus	2.1%	1.4%	2.5%	2.9%	3.2%
Train	2.1%	2.5%	3.2%	3.2%	3.2%
No Travel	-	14.3%	33.6%	45.0%	47.9%

A third study ⁷⁾ was undertaken in Texas by D. Karp, I. Crompton and D. Hensarling. They found that the fuel efficiency of a car affected the propensity to travel, and concluded that the large car and recreational vehicle markets would be hurt by increased gas prices. They found that when gasoline was rationed at 15 gallons weekly, of the 77% who saw their trips as essential, 40% would not cancel trips until the weekly gasoline allocation dropped to less than ten gallons. If high prices or rationing made their "desirable" trips unfeasible, 30.8% of respondents stated they would use alternative transportation, 26.1% would take a shorter trip and 43.1% would stay home. Table 109 shows at what gasoline price respondents would forego various types of travel.

GASOLINE PRICES AT WHICH DIFFERENT TYPES OF
TRIPS WOULD BE CANCELLED 7)

	\$1.00	\$1.50	\$2.00	\$2.50	>\$2.50
Vacation	38.5%	23.2%	28.4%	1.9%	7.9%
Visiting Friends and Relatives	66.6%	16.7%	16.7%	-	-
Business	10.0%	15.0%	10.0%	15.0%	50.0%
Convention	66.7%	-	-	-	33.3%
Other	27.3%	27.3%	600	dan	45.5%

Implications for Tourism

The percentage of people taking shorter trips will increase with the rising price and decreasing availability of gasoline. Therefore, it can be anticipated that the number of Metro Toronto residents visiting the Collingwood-Midland-Orillia area for tourism and recreational purposes will increase as longer trips are curtailed and people vacation closer to home.

As travel costs increase, there will be a greater emphasis on pre-planned single destination vacations, as opposed to touring types. In general, visitors will stay longer at one destination rather than visit a number of destinations during the single trip.

People will continue to travel, but less frequently and more strategically. A greater emphasis will be placed on lower energy consumption modes of travel such as mass/public transit (bus, train) group travel and travel in smaller cars. Despite high energy costs, it is anticipated that the private automobile will continue to be the dominant mode of transportation for individuals and families over short distances.

In addition to its affect on the overall propensity to travel, the increasing cost and decreasing availability of fuel is likely to affect the nature of the recreational activities engaged in. Motorized activities (snowmobiling, trail biking, and motor boating) may decrease in popularity while such activities as cross-country skiing and canoeing may gain participants.

d) Social Attitudes

In recent years there have been a number of changes in lifestyles and values which, in turn, affect consumerism. Old values such as upward mobility, materialism, self-denial, the Protestant work ethic and conformity have given wasy to self-fulfillment, self-entitlement, individualism and instant gratification. A number of key social themes have surfaced for the eighties - a focus on self (less sacrifice), self-knowledge, escapism from the stress of society, improvement of physical self, the "new" role of women, a changing of the family structure, naturalism vs. technology (naturalism seems to be waning except in food and personal care), and growing taste and sophistication. These trends will have implications for all segments of society, including consumer spending. It is anticipated that in the eighties there will be only minor curtailment of spending and people will continue to be receptive to luxury. As the protestant work ethic gives way to the psycology of affluence, people will "put money behind the mood".

A number of demographic and societal trends are increasing receptivity to travel. The number of people with higher education is growing and this, combined with greater awareness as a result of communication and media improvements, is causing increased interest in other lifestyles and countries. Leisure time is increasing as a result of longer paid vacations, flexible work schedules and job-sharing. Furthermore, men and women are marrying later and are having fewer children. The are also retiring earlier from the workforce. These developments, along with the rapid increase in the number of working wives and the growth of disposable income, have helped to create a large pool of people with both the time and money to travel.

More people today also have the inclination to travel. As the stress of modern life increases and job satisfaction decreases, the quality of life is becoming more important. The work ethic is gradually being replaced by a "leisure ethic" and vacations are being seen as a right rather than a privilege. People are less willing to forego a vacation today in spite of the economic situation. An increased interest in physical fitness has made outdoor sports holidays more popular. While many people still want "escapist" beach holidays, many others want to acquire new skills and knowledge while on vacation.

These trends and changes are common to all North American society, but as such can also play a role in influencing vacation and recreation patterns in Ontario.

Implications for Tourism

Growing numbers of people are becoming increasingly concerned about the quality of their life and are becoming more demanding about the meaningfulness of work and leisure pursuits, including vacation and recreation activities.

This, in combination with an increased awareness of environmental factors and physical fitness, is leading to a growing interest in outdoor vacation and sport facilities at pre-planned destinations. This increasingly sophisticated tourism is also demanding better quality and more diversified facilities and services.

As a result of a growing "leisure ethic" in western societies, the opportunity to take an annual vacation is now regarded more as a right than as a privilege, and most consumers seem very reluctant to sacrifice their holiday plans. In addition, an increasing average level of education in Ontario is leading to higher average levels of income and a corresponding increase in the potential for travel.

Cottaging

According to Statistics Canada, 7.5% (13,650) of the 195,000 households in Ontario owned vacation homes in 1976. The <u>Ontario Recreation Survey</u>, <u>Volume 7</u>, (1977) ranked "visiting a cottage or chalet" seventh of the seventy-three recreational activities studied.

The Ontario Ministry of Treasury and Economics estimated the value of the cottage industry in Ontario to be over \$2 billion in 1977 according to the following breakdown:

Estimated Value of Existing Undeveloped
Designated Cottage Land - \$780,800,000

Assessment Value of Cottage plus Land - \$951,483,000

Cottage-related Expenditures - \$490,919,223 \$2 223 202 223

According to the <u>Ontario Recreation Survey</u>, most people who buy a cottage are between 24-44 years of age. This segment makes up 30% of the population of the Metropolitan Toronto area and 31% of the City of Toronto. As the population ages, the size of this group of potential cottage owners will also grow. In fact, according to Statistics Canada, ownership rates in Ontario are increasing at 10,000 units per annum.

Futhermore, cottage ownership in Canada is directly related to income. In 1974, 17% of families earning \$25,000 owned one or more cottages, as compared to 7% of families earning between \$10-15,000. As discussed in part b) of this section, on the future of the Ontario economy, disposable income is expected to increase at 8.8% from 1978-82 and at 7.9% from 1983-87. Therefore, greater numbers of people with greater amounts of personal disposable income will live in the Toronto area and will be potential cottage owners. This market will be further increased by people who, unable to afford a house in the Toronto area, will rent an apartment in the City and buy a cottage. It is also anticipated that more people will want to escape stress and city life to vacationing in the country.

According to the <u>Ontario Recreation Survey</u>, 43% of Metro Toronto cottage owners drive less than two hours to reach their cottages while on weekend and vacation trips. Because of the ease of access the Collingwood-Midland-Orillia area is expected to remain very popular with Toronto resident cottagers. In fact,

A. E. LePage Realty, which handles many properties in the study area have reported that 1979 was a record year. According to a news release in August 1979 "cottage and resort properties concinue to be strong performers in the real estate market despite rising land prices and higher fuel costs". Many people are investing in resort area real estate as a hedge against inflation and "in many cases, resort property investments have not only kept pace with, but have actually surpassed inflation". Furthermore, the news release states that "rising costs of fuel and automobiles do not appear to have had any adverse effect upon the traditional desire of Ontario residents to 'head for the hills' during their leisure time, since, in real dollars, its costs many families no more to drive to the cottage for the weekend today than it did in 1958".

A number of other trends must also be considered, however, when one is looking at the future demand for cottages in the study area. Toronto has a large ethnic component which, speaking very generally, has little "cottaging" tradition in their background. In the 1976 census 36.2% of the population of the City of Toronto listed a language other than English as their mother tongue.

Although many people want to "get away from it all and back to nature", there also is a trend towards increasing sophistication and desire for urban conveniences and amenities while on vacation. Many working women do not want to spend their weekends in the traditionally "rustic" cottage without modern conveniences. (One economist suggested that there would be a good market for condominiums, especially along the waterfront, which could be an alternative to the traditional cottage.)

A third trend which will influence the demand for cottages is the rising cost of buying, building and maintaining a cottage. The average price of a waterfront lot in the Collingwood-Thornbury area is \$35,000, while back lots sell for around \$13,000. The

Ontario Ministry of Treasury and Economics examined the price of cottages in 1975 compared to 1963. In south-central Ontario, the price of lakeshore properties increased approximately five-fold between 1963 and 1975 while the price of rural lots increased eleven-fold. They calculated that a 100 ft. lakeshore lot and cottage would cost \$38,500 in 1975 as compared to \$8,200 in 1963. Mortgage payment for this property (over a twenty-five year period at appropriate interest rates) would have been \$357.46 monthly in 1975 compared to \$44.93 in 1963. Cottage building costs alone increased 2.5 times between 1972-1975.* These figures do not take into account increases in travel costs, hydro, heating, taxes etc. Therefore, in spite of the fact that real and disposable income is rising, the high price of owning a cottage could discourage potential cottage owners who have a wide choice of ways in which to spend their vacation dollars.

^{*} In the Township of Collingwood, only 12 cottage building permits were granted in 1978 as compared to 89 in 1972.

- 5.0 TOURISM PATTERNS, MARKETS & TRENDS NOTES
- 1. Ministry of Treasury & Economic, "Demographic Bulletin", January 1979.
- 2. Metropolitan Toronto Planning Department.
- 3. Ontario Economic Council, "Public Policy & Future Population in Ontario".
- 4. Ontario Economic Council, "The Ontario Economy to 1987".
- 5. T.M. Corsi & M.E. Harvey, "Changes in Vacation Travel in Response to Motor Fuel Shortages and Higher Prices", <u>Journal of Travel Research</u>, Winter 1979.
- 6. P. Williams, I. Burke & M. Datton, "The Potential Impact of Gasoline Futures on 1979 Vacation Travel Strategies", <u>Journal of Travel Research</u>, Summer 1979.
- 7. D. Karp, I. Crompton and D. Hensarling, "Reaction of Travellers to Gasoline Rationing and to Increase in Gasoline Prices", <u>Journal of Travel Research</u>, Summer 1979.

6.0 DEMOGRAPHIC CHARACTERISTICS

This section presents information on the demographic characteristics of populations residing in the Collingwood-Midland-Orillia study area. Socio-economic data compiled in Table 110 (p.280) reveals information on population, average population growth between 1966 and 1976, sex and age distribution, education levels, and average family income. The data are a summary of more detailed demographic tables assembled from census data at a previous stage of this study.

The total census population of the study area was 185,000 people in 1976. This number represents 2.2% of the total population of Ontario in the same year. The cities of Barrie and Orillia accounted for 18.6% (34,381 people) and 13.2% (24,410 people) respectively of the study area's population and have demographic characteristics which are somewhat different from the smaller, more rural communities.

Average total population growth throughout the study area was 14.3% between 1966 and 1976; however, this growth was not evenly distributed. The Town of Wasaga Beach experienced growth of 99% over that decade, while populations in the Town of Midland and in the Townships of Orillia and Euphrasia declined by 11.4%, 13.7% and 2% respectively.

The population of the study area is quite evenly distributed by sex group, with male residents accounting for 50.2% and females accounting for 49.8% in 1976. The greatest imbalance in sex distribution occurs in the village of Coldwater, where 45.3% of the population is male and 54.7% is female. There tend to be greater percentages of females in cities, towns and villages, while male residents tend to be the majority in townships.

Age distribution statistics (Table 110) indicate that younger members of the labour force (age 20 to 44) have a tendency to leave the area while people of retirement age (over 65) tend to either return or move to this region. The percentage of 20 to 44 year olds in the study area (31.4%) is 14% lower than the same age group within Ontario as a whole (36.4%). The percentage of people over 65 is 52% higher (13.1%) in the study area than in the province (8.6%).

The age distribution of the city of Barrie (see Table 111) is very similar to provincial age distribution statistics, indicating that this more urbanized centre has developed employment opportunities sufficient to retain a younger population.

Almost half of the adult population (over 15 years old) has completed some secondary school education (49.3%), while 28.7% have no secondary education (less than grade 9) and 22.1% have some post-secondary education.

As detailed in the 1971 census, family income in the study area averaged \$7,973 in 1970, the last date for which complete family income statistics are available. This figure was 25% lower than the provincial average of \$10,700 and 38% below the average of \$12,800 for Metropolitan Toronto. Within the study area, the Townships of Artemesia and Osprey and the Village of Victoria Harbour had the lowest family incomes of \$5,221, \$5,637 and \$6,925 respectively. These relatively low figures are not necessarily indicative of low standards of living. The majority of the residents of these communities are employed in agriculture which enables a satisfactory standard of living on a significantly lower income. The cities of Barrie and Orillia had the highest family earnings (\$10,404 and \$9,708 respectively). These relatively high average earnings reflect the urban character of these cities and their greater numbers of high salary jobs.

The above figures do not reveal any specific economically depressed areas. Instead, they tend to reflect the degree to which economies are based on agricultural production.

Census data on the distribution of mother tongues spoken within the study area, indicate the ethnic background of residents. With the exception of the Town of Penetanguishene and the Township of Tiny, which have significant Francophone populations of 29.3% and 32.2% respectively (according to 1976 census data), there are no significant representations of any ethnic group within any of the communities in the study area.

People whose mother tongue is French also make up 5% of the population of Midland and 6.9% of the population of Victoria Harbour. A number of residents of Dutch origin are found in the Townships of Flos (2.9%), Sunnidale (2.9%) and Vespra (2.3%) while people of German origin account for 3.2% of the population of the Township of Matchedash. People whose mother tongue is one of the North American Indian languages account for 3% of the population of the Town of Midland.

TABLE 111

AGE DISTRIBUTION - 1976 (Percentage of Total Population)

	0-19	10-44	45-64	over 65
Collingwood-Midland- Orillia Study Area *	34.2	31.4	21.1	13.1
Province of Ontario **	35.5	36.4	19.5	8.6
City of Barrie *	40.0	37.0	19.0	9.0

* Source: Statistics Canada, Canadian Census, 1976.

** Source: Ontario Ministry of Treasury Economics and Intergovernmental Affairs, Ontario Statistics 1977, Volume 1, Social Services. TABLE 110
DENOGRAPHIC SUTTARY

 (1)																and the second s
Average	Income			7,512	3,480		8,375	7,665	7,373	7,596	8,655	1 1	7,214	7,554	7,444	8,950
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Distri	Male	72-02		5 12	3 14	5 12	2 11	3 15	4 11	4 13	4 14	3 12	3 13	4 15	4. 13	3 15
Age		b-0		4 16	4 14	4 13	3 18	4 15	4 14	4 14	3 14	5 13	3 13	4 14	4 15	4 16
ion 1976	% Female			47.1	49.6	48.3	46.2	48.1	49.1	49.5	48.6	47.9	47.7	47.4	49.1	49.0
Populat	% Male			52.8	50.4	51.7	53.8	51.9	50.9	50.5	51.4	52.1	52.3	52.6	50.9	51.0
	Growth 1966-76(%)			10.	37.5		15.7	24.8	8.4	-13.7	25.6		2.9	41.7	20.3	28.6
	Population 1976			2,430	14,835	3,655	455	3,730	4,960	6,400	6,220	1,285	2,265	6,380	6,635	5,265
	Location		Townships	Flos	Innisfil	lara	Matchedash	Medonte	Nottawasaga	Orillia	Oro	Rama	Sunnidale	Тау	Tiny	Vespra

TABLE 110 CONTINUED DEMOGRAPHIC SURMARY

The state of the same was to the same and		Average	Populati	ion 1976	Age D		stributi	on	by Pe	rcen	4	النا (1 (5) (noi.	Average
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COULTY OF SINCOE															
Cities															
Barrie	34,381	19.8	48.8	51.2	4 14	5	3 9	4 4	8	7.0	4 10	2	5 52	32	10,404
Orillia	24,410	29.7	49.4	50.6	3 14	5 1.	3	5	2	7		7 2	9 45	27	9,708
Towns														-	
Collingwood	. 11,115	14.5	48.3	51.7	4 13	4	2 9	5 4	2	4 1	2 10	5	5 53	22	8,392
Midland	11,570	4.11-	.43.1	51.9	4 14	4 1	2 9	4 4	14	5	2 11	5. 2.	3 52	25	8,382
Penetanguishene	5,460	1.0	50.0	50.0	3 16	5	2 10	ر	23	70	1 10	7 34	1 49	17	3,696
Stayner	2,450	17.9	48.0	52.0	3 12	2	2 9	<u>м</u>		3	1 11	12 3	3 44	23	8,128
Wasaga Beach	4,985	99.2	49.2	50.8	3 12	4		8 4	_	4 1	1 13	8 22	2 53	22	7,396
Villages															
Coldwater	305	5.8	45.3	54.7		m	9 11	9	13	4	1 1	12 30) 44	28	7,629
Cookstown	975	10.8	1.67	50.9	3 12	2 1	5 9	<u>00</u>	12	2	3 10	7 22	2 55	24	7,629
Creemore	1,095	11.6	49.7	49.3	3 16	4 1	6	7 3	_	4 1	1 11	3	1 48	6	7,977
Elmvale	1,175	0.9	47.7	52.3	3 13	5 10	0 10	<i>∞</i>		4	1 11	111 33	3 44	23	9,665
Port McNicoll	1,525	12.6	49.8	50.5	5 14	5	3	2	14	5	3 9	4 25	5 58	17	7,359
Victoria Harbour	1,310	8.5	49.2	50.8	5 15	3	1 13	7 3	15	3	1 10	3	3 54	13	6,925
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TABLE 110 CONTINUED DEMOGRAPHIC SUMMARY

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COUNTY OF GREY													
Towns													
Meaford	4,315	5.7	48.0	52.0	3 12	4 11	10 8	3 12	3 11	12 11	34 45	. 22	8,648
Thornbury	1,325	7.4	47.5	52.5	3 10	4 11	10 9	3 10	3 9	1214	24 51	26	8,509
Villages													
Flesherton	570	5.4	50.0	50.0	4 16	2 11	12 8	2 11	2 11	12 11	31 46	23	9,313
Markdale	1,360	10.6	48.5	51.5	3 11	4 10	1110	3 11	3 10	12 12	32 47	, 22	8,220
Townships													
Artemesia	1,920	6.8	51.3	48.7	3 15	3 11	13 7	3 13	2 11	13 6	27 52	21	5,221
Collingwood	2,680	16.7	50.7	49.3	2 13	4 14	11 5	4 13	3 13	10 6	25 46	30	7,135
Euphrasia	1,485	-2.0	52.5	47.5	4 15	4 12	12 5	3 14	4 12	10 5	31 51	00	7,204
Osprey	1,750	7.7	52.3	47.7	3 16	3 13	11 5	4 14	3 11	10 5	37 48		5,637
St. Vincent	1,730	5.5	51.4	48.6	3 15	3 13	12 5	3 15	3 12	11 4	25 49	3 25	7,200
District Nunicipal- ity of Muskoka													
Township							or menda nes ness						
Georgian Bay	2,125	3.7	51.5	48.5	3 16	4 11	12 5	3 14	4 11		34 54	1 13	7,875
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7.0 JURISDICTIONS AND DEVELOPMENT CONTROLS

The development of land within Ontario is affected by several levels of planning controls established by public review agencies and government policy documents. The following section identifies the role of planning in development, the agencies involved and the guidelines which have direct or indirect bearing on the development of tourism within the study area.

Planning may be defined as a two-part activity consisting first of the establishment by government agencies of an overall development philosophy, and second, of the formulation and enforcement of policy directives (official guidelines, policy statements, plans, secondary plans, by-laws, etc.) which reflect that philosophy. These policy directives, as they exist within Ontario at the present time, are comprehensive and far-reaching. They embody not only the goals and objectives of government agencies, but also those of the diverse interests which will be affected by any planning decision.

Planning has outgrown its original preoccupations with physical health and safety - it is now concerned with complex issues of access to opportunities (for work, education and leisure), of equity and justice (and thus of deciding between the interests of different 'publics'), of allocating resources in ways which are politically acceptable as being efficient or fair (or preferably both), of adjusting to continuous uncontrollable changes in the economy, of reconciling rapidly growing electoral demands with slowly growing public income and of managing an increasingly complex government apparatus to deliver the public toods and services which are now expected.

7.1 Administrative Jurisdictions and Responsibilities

The Collingwood-Midland-Orillia Tourism Zone encompasses a myriad of government jurisdictions with their corresponding review agencies which have administrative functions and regulatory powers over various forms of development. Figures 15, 16a and 16b indicate the complexity of provincial and federal agency



Roles/Responsibilities of Provincial Agencies in the Tourism Industry

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Roles / Responsibilities of Federal Agencies in the Tourism Industry

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responsibilities as they apply to the development of the tourism industry within the study area. In addition to federal and provincial departments, ministries, agencies and commissions, development within the Collingwood-Midland-Orillia Tourism Zone is subject to review by 2 county municipalities, 1 district municipality, 2 city municipalities, 7 town municipalities, 8 village municipalities, 19 township municipalities, 5 joint planning areas and boards, 4 subsidiary planning areas and boards, and 8 single independent planning areas and boards. Conservation Authorities, acting as autonomous review agencies also have regulatory powers over development within the watershed over which they have jurisdiction.

Two public agencies, CORTS and the Niagara Escarpment Commission, have special influence over development within portions of the study area and therefore warrant some discussion.

a) CORTS

On February 20, 1975, the Governments of Canada and Ontario entered into the Canada-Ontario Rideau-Trent-Severn (CORTS) Agreement to implement the objectives of the CORTS Study Reports. This Agreement directs government efforts by coordinating the activities of federal and provincial agencies, and by developing a framework plan and programs for the acquisition and development of lands and facilities and the control of land uses within the corridor which extends through the entire study area from the Trent Canal in the east to Port Severn where the corridor ends in the west.

To implement this Agreement, an advisory structure was set up, consisting of an Advisory Committee and an Agreement Board.

The Government of Canada and Ontario recognizes the Rideau-Trent-Severn Corridor as one of central Canada's most significant recreational resources so that the official goal for the corridor is to develop a distinctive environmental corridor wherein a wide variety of recreational opportunities are available to users in a safe, pleasant and interesting environment and where optimum recreation use is achieved.

In December, 1977, a CORTS report "Interim Land Use Guide-lines" was released for consideration in future planning. These guidelines are intended for use by both government and private enterprise and indicate the character of the different parts of the corridor which should be preserved, as well as direction to be taken on a number of special issues. Recommendations contained in these guidelines have been incorporated into municipal Official Plans and supporting zoning by-laws.

Recreational management of the corridor is practiced by three levels of government. The lead agencies of the CORTS Agreement Board (e.g., Environment Canada and the Ministry of Natural Resources) provide a variety of opportunities for hiking, swimming, fishing, boating, and camping through the development of Provincial Parks and the operation of the Rideau-Trent-Severn waterways. Municipal governments and Conservation Authorities provide additional local parks, as well as swimming, camping, skiing, skating and cultural amenities, often with financial assistance from the senior governments.

Tourism and the general development of the tourism industry throughout the corridor is supported by the federal and provincial governments. Their agencies provide a variety of services to tourism entrepreneurs, ranging from loans to technical assistance. These agencies also endeavour to increase the demand for travel facilities and services through advertisement and promotion of the corridor in other regions.

b) Niagara Escarpment Commission

The Niagara Escarpment Commission (NEC) was established in 1973 by the Legislature of Ontario with the passage of the Niagara Escarpment Planning and Development Act in order to direct the preparation of a Master Plan covering the defined Niagara Escarpment Planning Area and to implement a limited system of Development Control.

The Plan for the Niagara Escarpment Area remains in draft form only and is still under discussion by public authorities and by the general public. Upon final Cabinet approval, the revised report will become the Provincial Plan for the Niagara Escarpment Area.

The basic goal of the Commission, as defined in the Niagara Escarpment Planning and Development Act is to prepare a plan "to provide for the maintenance of the Niagara Escarpment and land in its vicinity substantially as a continuous natural environment and to ensure that only such development occurs as is compatible with the natural environment."

In the preparation of a Provincial Plan for the Niagara Escarpment Area, the Commission is guided essentially by seven objectives as outlined in the Act:

- . to protect unique ecological and historic areas;
- . to maintain and enhance the quality and character of natural streams and water supplies;
- . to provide adequate opportunities for outdoor recreation;
- to maintain and enhance the open landscape character of the Niagara Escarpment insofar as possible, by such means as compatible farming or forestry and by preserving the natural scenery;

- to ensure that all new development is compatible with the purpose of the Act which is to provide for the maintenance of the Niagara Escarpment and land in its vicinity substantially as a continuous natural environment, and to ensure that only such development occurs as is compatible with the natural environment;
- . to provide for adequate public access to the Niagara Escarpment; and
- to support municipalities within the Niagara Escarpment Planning Area in their exercise of the planning functions conferred upon them by the Planning Act.

The NEC has two main functions. First, as a review agency, it comments on development proposals, Official Plans and by-laws within its area of jurisdiction. As part of the Provincial Secretariat for Resources Development, the NEC carries out this function according to the terms of the Planning Act.

Second, the NEC is charged with the preparation of the Niagara Escarpment Plan under the terms of the Niagara Escarpment Development Act.

The draft plan suggests that built-up areas, cities and regions implement the policies of the NEC through Official Plan and Zoning By-laws. Prime agricultural areas, it suggests, will meet the requirements of a Niagara Escarpment Plan through conformity with the new Ontario Food Land Guidelines.

Recreational areas such as ski resorts and parks, and historical and sensitive natural areas within the existing protection area of the escarpment will be subject to continuing development controls.

Other land uses (e.g. forestry, aggregate extraction) will continue to be governed by the terms of Acts affecting those land uses.

7.2 Government Policies and Programs

Many jurisdictional boundaries and areas of responsibility overlap, resulting in a great potential for conflict in policy direction. While attempts have been made to formulate an overall provincial strategy for development, none now exists. Documents which attempt to regulate development on a regional scale have been produced. Those relevant to development within the study area include Design for Development: The Toronto Centred Region, the COLUC (Central Ontario Lakeshore Urban Complex) Report and the Simcoe-Georgian Area Development Strategy.

a) Design for Development: The Toronto Centred Region

In 1966, the Province launched two programs which a few years later culminated in a combined regional government/regional development program. The first of these programs was Design for Development.

The report for the Toronto-Centred Region (1970) was the first in a series of regional development reports under the Design for Development program and provided a basic concept for the comprehensive development of an area within an arc extending 90 miles from Toronto. Most of the study area lies within the Peripheral Zone (Zone 3) with a smaller area within the Commutershed (Zone 2).

The report was to be used as a guideline to be followed in all government decisions having an effect on the Region and as a basis for public reaction as to how the Regional Development Concept could be carried out and how the broad proposals contained in it could be made more specific.

Key points of future development policy contained in the report and relating to tourism development within the study area are:

- Encourage growth in key places to the north (such as Barrie and Midland) and the east (such as Port Hope and Cobourg) where there already exists an unused potential for development. If so encouraged, such places will attract their own daily commuters and thus will reduce cummuting congesting to and from Toronto.
- . Carefully encourage selected communities along the northern route between Metropolitan Toronto and Barrie (Richmond Hill, Aurora, Newmarket) using existing and prospective public facilities.
- . Maintain the Georgian Bay shorelines, Lake Simcoe, Kawartha Lakes and the Niagara Escarpment as well as parts of the Lake Ontario shoreline, for conservation and recreation uses for the expanding population.
- . Develop a transportation pattern to provide the best possible service for all parts of the Region as envisioned in this concept.

The following general guidelines designed to help overcome emerging problems in the Toronto Centred Region are also relevant to the study area.

- . In the peripheral zone (Zone 3) develop such urban areas of reasonably significant size as Barrie and Midland in the North Simcoe district and another at, or in the vicinity of, Port Hope Cobourg. This reflects the conviction that decentralization of high growth from Metropolitan Toronto must begin soon and that these are appropriate places to encourage new growth.
- . Within the commutershed (Zone 2) adopt a policy of retaining land as much as possible for recreation and agricultural and open space uses. This policy would concentrate limited growth mainly within existing communities.
- . However, also within Zone 2, develop a small urban axis north of Metropolitan Toronto towards Barrie.
- . Maintain the Georgian Bay shore, Lake Simcoe, the Kawartha Lakes, the Niagara Escarpment, valley systems of the commutershed, and other key places as recreation and open space areas.
- . Create a transportation plan that will articulate the proposed Development Concept.

As formally adopted government policy, these guidelines have been used as a working guide for the various provincial departments and agencies involved in major development proposals of regional significance.

b) Central Ontario Lakeshore Urban Complex (COLUC)

In 1972, Design for Development, Phase III tied the regional government program firmly to the regional development program. The ten development regions were reduced to five planning regions. The Toronto Centred Region become one of these five, expanded and renamed the Central Ontario Region.

In 1974, the regional governments of Durham, Peel, Halton, Hamilton-Wentworth, Metropolitan Toronto and York formed the Central Ontario Lakeshore Urban Complex (COLUC) within the larger Central Ontario Region.

The policies contained in the COLUC Report were essentially those of Design for Development: The Toronto Centred Region with more attention given to specific issues and problems.

One recommendation made in the COLUC Report was the setting up of Task Forces to examine in detail several regions within the province. One of these regions was the Simcoe-Georgian Bay Area which encompasses most of the Collingwood-Midland-Orillia study area.

The COLUC Report never received official status by the Ontario Cabinet. It is, however, used as a guideline for public and private decisions expecially with regard to allocations of capital expenditures by government agencies.

c) Simcoe-Georgian Area Development Strategy

The terms of reference of the Simcoe-Georgian Area Task Force under the Design for Development Program were to devise a strategy for growth in the area consistent with stated local objectives and objectives formulated in the Toronto Centred Region Plan.

Essentially, the purpose of the strategy was to indicate how many people the Simcoe-Georgian Area should accommodate to the year 2011; where within the area they should live; and how the strategy could best be implemented.

At the outset, the following goals were established:

- . The achievement of the area's fullest economic potential;
- . The achievement of a high standard of living;
- . The conservation of natural, cultural and historical resources;
- . The minimization of pollution;
- . Provision of settlement patterns that offer a choice of lifestyles;
- . Flexibility; and
- . Provision of a method to accommodate desirable immediate development.

Policies formulated in the Simcoe-Georgian Area Development Strategy Study included several recommendations relevant to the development of the tourism industry in the Collingwood-Midland-Orillia Tourism zone.

The objective of the strategy, from a recreational and tourism point of view, was to make all locations more self-sufficient and to exploit the extended-use opportunities of the area. To this end, the report recommended:

- i) The preparation of a detailed recreational plan within the context of the development plan. This recreation plan would focus, in particular, on the shores of Lake Simcoe and Georgian Bay, and on the inland recreational resources such as the Oro Hills. Its terms of reference might include:
 - . The designation of lands for resort areas.
 - . The designation of lands for seasonal and cottage uses.
 - . The designation of lands for public parks and beaches. It is noted that the CORTS study proposed that the level of public ownership of land along Lake Simcoe should be brought up to about 15 per cent from its present three to five per cent.
 - The review of suitable locations for ski developments and, associated with this, the review of locations for recreational communities.
 - . Feasibility studies for the development of a new recreational community to take advantage of the four-season capability of the Collingwood-Wasaga Beach area.
- ii) Pending the completion of the study, favourable responses should be given to proposals for recreational community developments, on condition that these developments have the potential to reach a population level (about 1,000 people) at which an adequate level of services can be provided economically. Such developments must be consistent with the growth rate and levels allocated to the particular municipality.
- iii) The conversion of seasonal to permanent dwellings in essentially recreational areas should be discouraged. This means a clear statement that only a limited number of absolutely essential services will be provided in such areas, unless they form part of a specific compact urban area. It is recognized that the long-term maintenance of seasonal uses is difficult, hence recommendation (ii).
- iv) No developments, save recreational developments should be permitted on 1st, 2nd, 3rd, or 4th Class recreational lands outside urban areas until the completion of the recreation study.

The recommendations contained in Simcoe-Georgian Area Development Strategy Study never received official status by the Cabinet. However, the study is used as a guideline for public and private decisions and is most used by provincial ministries to establish priorities for capital expenditures within the Simcoe-Georgian Area. Many of the recommendations are incorporated into Municipal and Regional Official Plans.

d) Other Policies and Guidelines

In addition to the aforementioned regional plans, the following municipalities have, or are in the process of completing Official Plans (Status as of January 1980):

District of Muskoka - approved 1975
Oro - approved 1969
Barrie - approved 1979

Cookstown - partially approved 1974
- partially approved 1977

Couchiching - not approved - old plan repealed.

Creemore - approved 1979

Elmvale - approved 1971

Elmvale - approved 1976

Innisfil - not approved - old plan repealed.

Medonte - not approved - old plan repealed.

Midland - approved 1978

Nottawasaga - approved 1978

Orillia - approved 1969

Penetang - approved 1974

Port McNicol - not approved.

Stayner - approved 1974

Sunnidale - approved 1969

Tay - partially approved 1979

Tiny - approved 1971 Vespra - approved 1969

Tiny-Tay - not approved - draft plan likely to

have major changes.

Victoria Harbour - not approved - draft plan likely to

have major changes.

Wasaga Beach - not approved
Beaver Valley - approved 1974

Meaford - partially approved 1974

St. Vincent - partially approved.

More specific and detailed Secondary Plans have been completed for 8 areas in Tiny Township and 4 in Oro Township.

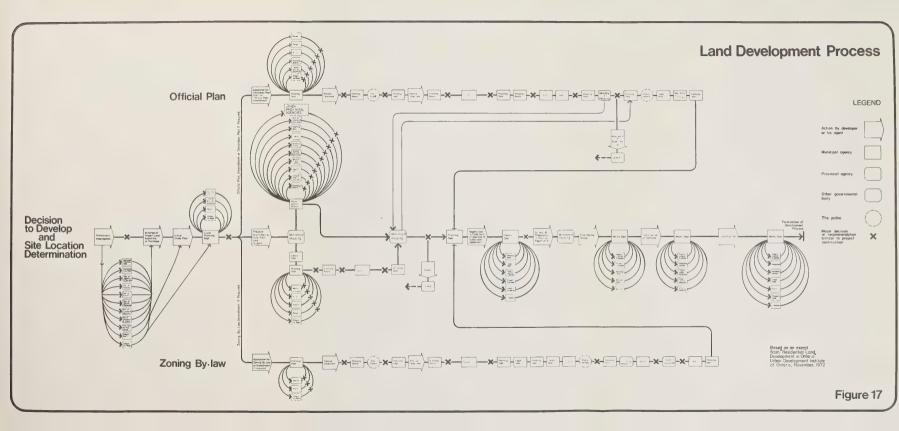
Other legislation and official policy which will effect the development of the tourism industry within the study area include the Planning Act, the Environmental Assessment Act, the Environmental Protection Act, the Conservation Authorities Act, the Niagara Escarpment Planning and Development Act, the Municipal Act, the Food Land Guidelines and the Agricultural Code of Practice.

7.3 Land Development Process

The land development process must be responsive to concerns regarding aesthetic and functional design, public health, welfare and safety, and the ability of municipalities to provide a full range of public services to meet the needs of the entire community.

Figure 17 indicates the direction of the flow of information and decision making during the process of land development. As seen in this flow diagram, a development proposal is first submitted to the appropriate local municipality for review and local approval. It is then submitted for review and approval to consecutively higher levels of jurisdiction until the Minister of Housing or his designate gives final approval. In addition to the federal government and its various departments, development in Ontario can be reviewed by 22 provincial ministries and their various departments, and some 50 public agencies and Crown corporations.







NOTES

- 7.0 JURISDICTIONS AND DEVELOPMENT CONTROLS
 - 1. Cullingworth, J.B., Ontario Planning, University of Toronto, 1978.



